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ABSTRACT

A team of examiners from the Organisation for Economic Cooperation and Development (OECD) reviews Portugal's education system in a three-part report. Part One begins with the consequences of the 1974 revolution, Portugal's economic problems, its impending attachment to the European Economic Community, and rising public expectations about education. It continues with criticism of the Ministry of Education, which is overstaffed and has duplicate functions. The examiners propose reduction of branches and suggest the establishment of a national education advisory council and closer relations with other government agencies. A high priority for the compulsory school-level education (four primary and two preparatory grades) is improvement of standards in rural areas. Accepting the future extension of compulsory schooling from 6 to 9 years, the examiners counsel step-by-step reform of the school structure and curriculum. Education of 16-to-19 year olds is a problematic issue since upper-secondary schools are not providing adequate vocational courses. The examiners feel a solution is for Portugal to adopt a comprehensive education and training policy for that age group implemented jointly by the Ministries of Education and Labor. Part Two of the report includes a record of the review meeting between the OECD examiners and the Minister of Education and his delegates and addresses five areas of concern. The third part is a summary of the Ministry of Education's Backgroud Report of the education system in Portugal. (MD)

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REVIEWS OF NATIONAL POLICIES FOR EDUCATION

PORTUGAL

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Many aspects of education and training in Portugal have been the subject of OECD reports during the past two decades, but until 1982 the country's education system as a whole had not been reviewed. The present review by a team of Examiners, who visited Portugal at the end of 1982, fills the gap.

The Examiners have thought it necessary to begin by stressing certain external factors impinging on the education system in Portugal: the consequences of the political revolution of 1974; urgent economic problems; impending adherence to the European Economic Community; rising public expectations about education. These factors weigh all the more heavily in that Portugal, having lagged behind most OECD countries in the scope of its educational provision, must now strive to bring about the all-out expansion to which successive governments have been committed since 1974.

The Examiners point out that in embarking on major educational reforms Portugal enjoys important psychological assets. One of these is the high respect in which education is held by the public. A second is the will to succeed that is to be found at all levels of the education system. Thirdly, Portugal is entirely open to new educational ideas and always interested in launching educational experiments.

Before turning to the main educational sectors the Examiners consider the capacity of the Ministry of Education to plan and implement the many reforms already under way or impending. Believing that there may be some overmanning and unnecessary duplication of functions among directorates and divisions, they propose a reduction of the number of separate branches and measures to make the internal communication system more efficient. At the same time, they believe that the Minister himself would be better served if he could call upon the expert advice of a strong internal planning department as well as external advisers. For the latter purpose they suggest the establishment of a national advisory council.

The Examiners consider that closer relations with other ministries and government agencies are needed and that, in particular, the respective roles of the Ministries of Education and Public Works with regard to educational buildings should be clarified. They also recommend the transfer of some ministerial functions to the regional and community levels and a general devolution of powers and responsibilities.

At the compulsory school level, they believe that the improvement of standards in rural areas remains a high priority. They speculate on the future of the preparatory school, which may perhaps have outlived its usefulness, and of *telescola,* which has been a great success, by international as well as national standards, and should not readily be abandoned. Accepting as a political imperative the extension of compulsory schooling from six to nine years, they nevertheless counsel step-by-step reform of the school's structures and curriculum. In their view, it is also essential to offer an alternative to the traditional lower secondary school to those numerous young people who see no point in staying in education beyond the age of twelve or so, or for whom no places will be available until the school building programme catches up with demand.

The education of 16-to-19 year-olds is regarded by the Examiners as a particularly problematic issue. They feel that, on the one hand, the upper secondary school is too traditional in its values and subject offerings and unable to provide adequate vocational courses for that large group of pupils who will not proceed to university. On the other hand, they fear that facilities for education and training outside the upper secondary school are much too thin. The only solution in their opinion is for Portugal to adopt a comprehensive education and training policy for the whole age group which should be implemented by means of full coordination among several ministries and notably between the Ministries of Education and Labour.

Finally, the Examiners consider that facilities for professional and vocational training are gravely lacking at the post-secondary level. What is required is a diversified system in which polytechnics and other institutions can operate independently of the universities. This is all the more urgent a need in view of the limited access to universities.

The Portuguese authorities are well aware of the scale and complexity of the problems to be overcome in pursuit of their expansionist and egalitarian policies. Led by the Minister of Education, a delegation to OECD replied to the questions of the Examiners with complete frankness. The record of the review meeting constitutes Part Two of this report.

In conducting their task the Examiners had the opportunity to consult a very full and characteristically self-critical background survey prepared by the Portuguese authorities. Part Three of this report comprises a summary of that survey.

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Part One

THE EXAMINERS' REPORT

I

A NEW DEMOCRACY AND ECONOMIC DEVELOPMENT

Revolution of 1974

Not yet ten years have passed since Portugal experienced the bloodless revolution of 25 April 1974 – a date already deeply engraved in public memory – that overthrew a worn-out dictatorship and opened the way, after initial hesitation, for a democratic system of government. Less than eight years have passed since Portugal gave up Angola and Mozambique, the last but one (Macao) of the colonies that had constituted one of the oldest and largest overseas empire in the world, an empire that drained off many of its best brains and substantial economic resources. Few countries in history have undergone two such traumatic changes in so short a space of time. Portugal has ridden the storm and, though today still faced with acute political, economic and social problems, its future as a democratic European nation appears secure.

Basic facts

Portugal is a small country covering an area of 92 000 km^2 (including the islands of Madeira and the Azores) with a population just below ten million. Population growth has now levelled off (the birth rate, one of the highest in Europe, reached a peak of 24.3 per '000 in 1950 and had fallen to about 15 per '000 in 1978) but during the seventies it was necessary to absorb 700 000 nationals from the former "colonies". About one million emigrants, mostly between the age of 15-64 and preponderantly male, are working in other countries, mainly in Europe. There are also several million people of Portuguese descent living in South America and North America who maintain close ties with their motherland.

The population is unevenly distributed over the country, the North being more densely populated than the South and the coast more than the interior. A process of rapid urbanisation begun in the late sixties continues, especially around the two major cities of Lisbon and Oporto. Despite urban drift a high percentage of the population continues to live in rural areas.

Especially significant for the education system is the youthfulness of the population; significantly, half those returning from the former colonies were under sixteen.

Table 1. Age distribution of the population, in percentage, 1971-79 and 1981

	0-14	15-64	65+
1971	28.4	62.6	9.0
1981	26.0	64.2	9.8

It is to be noted that Portugal has the largest percentage of children in the age group 0-14 among OECD countries and one of the smallest percentages of people over 65.

Economic statistics reveal that Portugal is one of the poorest OECD Member countries. Statistics tell us little, however, about its rich artistic inheritance, its quality of life and its distinctive culture. Portugal has existed as an independent country within the same frontiers since 1297 and is proud of its deep historical roots. Under the impact of modernisation it presents striking contrasts between old and new. The streets of Lisbon and Porto are crammed with vehicles, rush hours being as hectic as in London or Paris. The oldest university, Coimbra, which, as pointed out by the Swedish examiner, was founded 140 years before Upsala in Sweden, has some buildings of antiquity and beauty. Such prestigious institutions help to preserve a strong sense of national continuity and serve as a reminder of Portuguese eminence in Europe, from the 15th to the 17th centuries, based on riches derived from discovery and trade, such as those which the Council of Europe's current festivities in Portugal celebrate.

Political and economic setting

In order to consolidate its new democratic institutions and develop its economy under post-imperial conditions, Portugal attaches the highest importance to making the maximum use of its human resources and to expanding and reforming to that end its education and training system. It recognizes that a democratic state will only function effectively if the mass of the population is well-informed and civic-minded. Similarly, the economy will flourish only if the quality of the nation's workforce is high and its skills appropriate to the needs of the emerging economic sectors that must urgently be developed. The role of education in Portugal is predicated by the prevailing political and economic background.

Politically, there are two main problems. The first is how to achieve greater stability at the centre of government. The second is how to bring about mass participation in the democratic process by increasing the powers of regional and local government.

Political instability is mainly caused by the inevitable difficulty of implementing a novel constitution and by the existence of a plethora of political parties that militates against the formation of stable coalitions. Firm and consistent management of the country cannot be secured so long as governments are obliged to live from day to day and the leadership of the various ministries is constantly changing. In nine years there have followed over a dozen governments. Each has had enough time to criticise whatever went before and to destroy working components of it: none has had time enough to construct lasting alternatives. As a consequence, ardent reformers, especially in the hearing of sympathetic visitors, incline to present their intentions as though these were achieved facts. In Chapter II we shall be stressing the particular difficulty of forming a coherent education policy in the absence of ministerial and senior administrative continuity.

Since 1974, decentralisation of power has been one of the principal aims of all governments, which have seen that agrarian and other essential reforms cannot be achieved unless people at the regional and local levels can play an active part in the process of planned change. However, it is hardly to be expected that people who have been unaccustomed to the exercise of any power will learn overnight how to govern themselves or, indeed, feel impelled to do so. So it has become necessary not only to create a strong regional and local administrative infrastructure but also to motivate a critical mass of people to engage in public affairs. The schools must now help prepare the young generation to become active citizens in the future.

Portugal's *economy* is beset with a variety of daunting problems. The balance of payments deficit at the end of 1982 attained $3.254 billions. Consumer prices went up by 25 per cent that same year. The country's natural resources are limited; more than half of its food requirements have to be imported, including three-quarters of its grain. Remittances from Portuguese working abroad are indispensable but have declined in real value during the last three years. Tourism is a major industry (7 277 000 tourists in 1982) that has rapidly expanded since 1974 but its potential is not limitless. Foreign investment has been considerably lower than expected. Despite this negative balance sheet, Portugal has also to prepare for its entry into the European Economic Community (EEC) in 1984.

If yielding its colonial empire has caused Portugal to concentrate upon the development needs of the homeland, as suggested above, it has also caused it to turn towards Europe. Portugal already belongs to NATO, the Council of Europe and the European Free Trade Area. Now it sets great store by its imminent accession to the EEC. Recognizing that its economy must be strong enough to bear the shock of European competition, Portugal has yet another powerful reason for wishing to raise the educational standards of its people so that they may compare favourably with those of the other countries of the EEC.

The fundamental problem is that the Portuguese economy is structurally deficient. For many long years it lay stagnant as businessmen and the educated elite focused their attention on the colonies. Over a third of the workforce is still engaged in agriculture (in 1980 the workforce was divided as follows: agriculture = 1 082 000 persons; industry = 1 071 000; construction = 372 000; services = 1 430 000). Much of the land in the North of the country is fragmented into small holdings of scattered plots from which the proprietors eke out a living at subsistence level. The occurrence of a drought, as in 1981, can wreak great hardship. There are hundreds of villages with fewer than 100 inhabitants. The agricultural yield is generally very low, contributing only 18 per cent of GNP. The government is fully aware of the need to restructure the economy and treats modernisation of the agricultural sector as a top priority. To those ends it is devoting massive efforts. Such measures as the concentration of small holdings and cooperative investment and production are, however, proving difficult to implement.

Outside agriculture, the government is seeking accelerated industrial development. Here one outstanding problem is the shortage of major enterprises; less than 2 per cent of firms employ more than 500 workers; 80 per cent or approximately 12 000 of industrial firms employ fewer than 50 workers. In order to increase foreign trade it is essential to encourage export-led manufactures based on new medium technology and to diversify production[1].

Some advantages

In pursuing its policy of modernisation Portugal can point to some achievements and reassuring factors.The annual increase in GNP for the years 1978-80 was the most rapid among OECD countries. The birth rate is no longer rising. The energies of many leading businessmen, administrators and intellectuals formerly diverted to overseas interests have been turned towards home. The educated elite comprises a relatively small circle of highly competent persons, most of whom are known to one another. Such intimacy, characteristic of a society still largely or recently rural, in which the towns and even the cities function on a human scale, counteracts the instability of government by guaranteeing some degree of mutual understanding and cooperation among the leading spirits in government and society. At the same time, Portugal is wide open to new ideas as befits a nation of explorers and settlers. It is unafraid of and, indeed, readily invites external criticism, as we discovered during our interviews. People argue with Latin fervour but are fundamentally tolerant. Racial discrimination is unheard of. Men still dominate the professions but women now have equal rights before the law and are increasingly taking advantage of them . Significantly, industrial disputes have not been excessive. There is an immense amount of good will and ingenuity to be tapped at all levels in society and in all parts of the country. The challenge is how to harness the motivation and latent energy that exists to economic development and social reform. In fulfilment of this task, education is seen to have a major contribution to make.

Development of education

Portugal has lagged behind most of the rest of Western Europe in its educational provision. Compulsory schooling for girls was not introduced until 1960 and the duration of compulsory schooling was still only four years till 1964 when it was extended to six years. In the future it will cover nine years, thus bringing it into line with other OECD countries.

The revolution gave an instant fillip to education. In the name of social justice the State was committed to its all-out expansion. Education instantly became and has remained a focus of public concern and controversy. Parental expectations for their children have been raised. Yet it is important to note three striking historical facts. The first is that participation in formal education in the 1960s increased at roughly the same rate as in the 1970s and that overall participation has increased by no less than two-thirds in just over twenty years.

Table 2 **Total enrolments**

1960-61	1970-71	1977-78	1981-82
1 147 200	1 503 300	1 905 200	1 950 000

The second fact is that much of that increase in participation has been due to rising female enrolments with the result that today boys and girls are about equally represented not only in the compulsory school but in the secondary school as well. The third fact is that important progressive educational reforms had been introduced or were being prepared under the pre-revolutionary administration. These have been developed since, and the emphasis on equal opportunities and on education's social role has since been enhanced.

An uphill struggle

The stark reality remains that the education system in Portugal faces an uphill struggle over the next decade. It must strive to sustain rural schools in isolated communities while the steady exodus of rural families into the towns and cities creates a relentless demand for new schools. Even before the authorities have overcome the problems of extending compulsory schooling to six years they must now gird themselves to meet the challenge of providing places to cover nine compulsory years within a relatively short time frame. Schools in urban areas are already operating a shift system and many are open from early in the morning until the late evening; we were told of a school built for 1 200 now catering for 5 000 pupils. There is an acute shortage of textbooks and learning materials. Curiously enough, there is not an overall shortage of teachers but there is a shortage of fully qualified teachers in parts of the hinterland as well as of subject teachers at the secondary level and in new subject areas. Among adults there is a high illiteracy rate.

Vocational education and training provision has been sorely neglected, although it is essential to the development of the economy, particularly to the establishment of new industries and to an increase in agricultural yields. There is an acute shortage of technicians, paraprofessionals and middle-management personnel – a shortage which can only be remedied by difficult joint action between education and other departments of government as well as with employers. Nevertheless, the need to develop occupational skills is so imperative that we shall make no apologies for devoting a whole chapter to the contribution of the formal education system to vocational education and training.

Vocational education and training are also of vital importance in helping reduce the high rate of unemployment among young people that is now affecting Portugal along with many other OECD countries. Before the world economic recession began around 1975, Portugal had one of the highest unemployment rates for all age groups (5.5 per cent in 1975) among OECD countries. Today the rate is just over 8 per cent and no higher or even less high than in a number of other countries. However, the rate is especially high for the age groups 15-19 and 20-24.

Table 3. **Breakdown of youth population in 1981**

	Age Group		
	10-14	15-19	20-24
TOTAL	828 000	813 000	814 000
Active	88 000	502 000	592 000
Employment rate	10.6	61.7	72.7
Unemployed	17 000	108 000	98 000
Percentage	19.3	21.6	16.6
First-job seekers	17 000	90 000	61 000

Source: INE- Standing Inquiry on Employment.

The youth unemployment issue is the focus of a concurrent OECD examination under the auspices of the Manpower and Social Affairs Committee[2] and we do not propose, therefore, to discuss all its aspects. In Chapter IV, however, we shall be dealing with its implications for the structure and curriculum of the secondary schools and for the choice of priorities in the post-secondary sector.

Research and development with all their importance for a country's future have also been severely neglected. Portugal has an ancient university tradition, but until recently the universities existed for the benefit of a narrowly-based elite and preferred theoretical to practical learning. Nor have research and development been nurtured outside the universities. We shall be considering this topic in Chapter VI, but only briefly, because it so happens that a concurrent examination by OECD, this time on Science Policy, is being carried out under the auspices of the Committee for Scientific and Technological Policy[3].

The qualitative factor

The quantitative expansion of education in Portugal over the last twenty years or so has been striking and will necessarily continue to be so for four reasons: first, implementation of the extension of compulsory schooling by three years will eventually bring about 30 per cent more enrolments into the lower secondary schools; secondly, the expansion of lower secondary schooling will inevitably lead to the expansion of upper secondary education; thirdly, expansion of the non-university sector of post-school education is planned; fourthly, it is intended to offer increasing educational opportunities for adults.

Expansion raises urgent questions about the quality of the education being provided. Is Portugal offering school curricula appropriate to the actual needs of young people and the economy? Is the balance correct between academic and professional studies at the post-secondary level? Are reasonable academic standards being maintained throughout the education system? Is the performance of teachers satisfactory? Is the campaign against adult illiteracy sufficiently dynamic? There are signs that, despite an abundance of far-reaching reform plans, pilot schemes and micro innovations, the main structure of the education system is not as flexible or responsive to changing demands as it might be. This is partly because of the gap that exists between political aspirations and administrative implementation, which we shall discuss in the next chapter. In particular, an enormous effort is required in order to develop the pool of knowledge and skills required to fuel economic development.

A caveat

We end this chapter with a caveat. Those who enquire into Portuguese education from countries with a long, liberal tradition, based on extensive industrialisation, need to be aware of how easily their preconceptions may lead to misinterpretation. Moreover, the unavoidable dependence of foreign visitors on official sources of information during a brief visit provides little opportunity for the corrective to first assumptions which longer acquaintance and informal converse over time can provide. There are particular dangers in taking official statements "au pied de la lettre" in periods of rapid political and social change, since intention or administrative declaration may not always be easy to distinguish from achieved fact. We hope that our judgements are reasonably circumspect and that in the following chapters we have identified the main issues and dilemmas facing the Portuguese education system as it seeks to grapple simultaneously with sweeping structural and curricular changes and rapid quantitative expansion over a very short time span.

II

EDUCATIONAL POLICY-MAKING AND ADMINISTRATION

Crucial for the future of education in Portugal and one of the main preoccupations of Ministers of Education since the revolution is how to improve the efficiency of the policy-making and planning process and the administrative and managerial machinery. In striving to develop a democratic system capable of producing competent and economically productive young people and stimulating adult learning, Portugal has simultaneously to shake off the legacy of an unduly centralised and static administration and to cope with the consequences of the spectacular rise in school and university enrolments in recent years and the projected rise up to 1990. The task is a daunting one. That a team of outsiders should in this report suggest some of the ways and means of undertaking this task might seem arrogant, but, in reality, our suggestions are very largely derived from ideas and proposals expressed to us by politicians, senior government administrators and leading educationists. For there can be few countries in which the art of self-criticism has been carried to such a high degree of frankness and sophistication as in Portugal. We shall first consider the aims and practicability of the present plans for educational development and then offer an analysis of the administrative and logistical factors that are bound to affect its implementation.

During the past few years there have been wide public discussions about the aims and objectives of education. The aspiration is to introduce order and coherence into a system that has hitherto developed at random in terms both of an ideal of social justice and of the specific manpower needs of an expanding economy.

Any education system invariably reflects an uneasy compromise between immediate social demands and future potentialities. After the long years of social immobility during the "Estado Novo", the revolution of "April 25" inevitably released a passion for reform in education. However, carrying through educational reform is notoriously a slow business. The revolution resulted neither in a consensus about what kind of educational reform was needed, nor in the stability of government and administration prerequisite to devising and implementing long-term plans. The last decade in Portugal has been characterised by many incomplete educational initiatives. It has been as though architects of radically differing views had been appointed in rapid succession to a building project. Each architect has had just enough time to present a far-reaching design (and sometimes to dismantle or at least to undermine any existing structure standing in the way of it) before being replaced. Designs thus produced escape the burden of responsibility. They tend to be sketches of some social or pedagogic ideal rather than the product of those hard-won compromises with public acceptability and financial, administrative and physical constraints which characterise all positive reconstruction. For the education system in Portugal, the result has been a perceptible disparity between aspirations and their realisation, and an accumulation of harsh practical problems, to which the Background Report[4] gives a frank testimony.

Faced with a long inventory of needed reforms we found ourselves at first dubious about the current preoccupation with the necessity of promulgating a general law on education. We feared that disproportionate interest and energy were being invested in fine disputations about hypothetical future policies. While not all our scepticism has been dispelled, we became increasingly sympathetic to the desirability of such a law. The continuing instability of government in Portugal makes it urgent to establish a consensus in educational matters across the political parties. The hope must be that, in broad principles at least, successive administrations will feel bound to adhere to a plan carefully conceived, after full and extensive public, professional and parliamentary debate. So far, the practice has been for each new government to follow its own preferred solutions and priorities, abandoning most of what went before. A steady sense of direction is urgently needed. However, it is only too easy to arrive at a consensus at the level of lofty and imprecise generalities or, ignoring *a priori* issues like claims on limited resources, by fixing on a grand but distant design. It is obvious, therefore that much thought will have to be channelled into devising ways and means of implementing the various reforms under discussion. In particular, it will be important to establish a set of priorities and options which, though not to be treated as sacrosanct, might provide a coherent framework for action and a bench-mark from which to measure progress. It will be no less important to plan the implementation of reforms on the basis of reliable quantitative data. At present an overall statistical time-frame is lacking, although there is no lack of discrete statistical projections. It will also be necessary to computerise both the data and the process of interpreting them.

In our view it would be timely to enact a general law less than a decade after the events of 1974 and on the eve of Portugal's entry into the EEC. However, we question the authorities' intention to phase in the implementation of major reforms over fifteen to twenty years. They are undoubtedly right to wish to avoid raising false hopes of easy progress and to ensure that the introduction of reforms will be geared to the availability of adequate funds. This last is a decisive factor given that the education budget is large, having been multiplied by 15 in current prices[5] in less than ten years, primarily owing to the expansion of preparatory and secondary education. However, fifteen to twenty years is a long perspective in any political chronology and it would be more realistic to assume a shorter span of years, during which an agreed, continuing planning framework applies.

MINISTRY OF EDUCATION

Adequate powers

It is essential that the Minister of Education should have freedom of action and adequate resources. Critical choices have to be made with respect to fundamental matters such as the balance between general and vocational education in the secondary school, the training of teachers, the role to be assigned to pre-primary education, and the priority to be given to adult education. As matters now stand, however, action by the Minister seems to be subject to two severe constraints: the first is the permanent state of uncertainty concerning the size of each succeeding annual budget; the second lies in his lack of control over the policy governing the building programme and the ambiguous role of the Ministry of Housing and Public Works. It would accordingly be advisable to clarify the scope of the powers of the Ministry of Education.

The instability factor

Within a broad framework of legislative authorization, ministers govern by decree. Indeed, the checks and balances among components of government, enshrined in the Constitution, make recourse to decrees tempting. The brevity of tenure of ministerial office encourages attack on entrenched and intractable problems by distant bombardment of administrative proposals rather than by the necessarily gradual process of engaging the full commitment of those who must implement them. All too often, decrees often have small effect beyond some re-shuffling of posts in the administrative cadre. Above all, the timetables for action, part of the traditional format of decrees, are seldom adhered to in practice.

However, personnel changes by no means coincide with a change of government. Because the number of experienced professionals is small, because rapid changes in government create such discontinuities at the highest political level that continuity in the upper reaches of administration becomes all the more important, because career insecurity beyond a certain point is insupportable and protective conventions arise, a minister and his under-secretaries run the risk of finding themselves surrounded by directors-general and other senior staff who are neither unpolitical, as are civil servants in some countries, nor loyal to what is likely to be a transitory regime.

These are, of course, problems not unknown to several other OECD countries and in Portugal they arise inevitably from the very recent evolution from an autocratic to a democratic system of government and the consequent search for political compromise. Readily recognizing that they cannot be solved by waving a wand, we would only suggest that, as far as possible, consideration should be given to making future appointments from the Director-General level downwards according to non-political criteria.

Devolution and decentralisation

Politicians and senior administrators alike agree that the mechanisms for supervising and managing the education system are so highly concentrated in the Ministry of Education that nearly all local initiative is stifled and the Ministry itself is overburdened with a mass of minor tasks and minute problems. There is no regional structure and local districts exercise only a few powers. It would certainly be desirable to relieve the Ministry of a number of its existing duties and many specific tasks, so as to delegate decision-making to lower levels. Such devolution would at once relieve the Ministry of secondary tasks and enable it both to focus more time and resources on overall policy concerns and long-term planning and encourage local action to contend with problems that might be better resolved at this level. For example, the regions are likely to be better placed than the centre to identify staffing requirements in the schools, to administer the recruitment and posting process, and to deal with such matters as the appointment and supervision of school caretakers. How far down decentralisation should go is a matter for considered judgement in the light of national traditions and practical feasibility. But some duties and managerial responsibilities could very well be devolved to regional level and to the larger municipalities. Below that level it would be desirable to define in detail the type of organisation to be developed in order to ensure local participation in educational decision-making. In a country with a centuries-old tradition of highly-centralised government, it is vital to promote the development of democratic participation at all levels. Why should not local communities play a major role in the day-to-day control and management of primary schools as well as in their initial establishment?

In particular, it would be advisable for the Ministry to delegate to regional and local levels its "social functions", which at present include the provision of school transport, canteens and boarding facilities. This would have the incidental advantage of encouraging communities to exercise full responsibility for mobilising additional resources and establishing a better balance between the services provided and the needs experienced locally. It would also provide the opportunity to examine, with due regard to the practicalities concerned, the possible contracting out of some of these functions, as is already done in some parts of the country for transport.

Rationalisation of administrative functions

Shedding some of its present powers and duties would also enable the Ministry of Education to rationalise its own administrative structure. Senior officials are well aware that the Ministry has developed on a piecemeal basis, adding sections one after another to meet *ad hoc* needs. As a result, it is now split up into many administrative divisions and specialised units of differing importance and there is considerable overlapping of functions alongside critical administrative gaps. Consideration should be given therefore to restructuring the existing fragmented organisation. This might also have the immediate advantage of creating vertical and horizontal career paths in the grading of posts which would be equitable and conducive to greater efficiency.

The obvious solution is to reduce the number of divisions and specialised units and concentrate powers where they can be exercised most efficiently. The very number of posts in the Ministry, which is excessive by international norms, might also be reduced, partly by transferring officials to the new regional and departmental services (which it was suggested above should be set up) and partly by the return to the schools of some of the teachers at present seconded to the Ministry.

The relations between the different directorates also require some adjustment so that their respective functions may be defined more precisely. Some administrative units might be discontinued, while others could well be located outside the Ministry. Particular questions also arise as to the status and powers of the Directorate for Higher Education and its relationship to other directorates and to the future of the two main Directorates General (DGEB and DGES) for basic and secondary education, respectively. These two Directorates have lost control over the inspectorate and teacher postings now conducted by two directorates-general for Personnel and Administration (DGAP) and the Inspectorate-general for Education. We encountered much criticism of their efficiency and cooperation between them was reported to be bad, each going its own way. Yet their effectiveness is central to the quality of the curriculum and teaching in the schools. The worst effects are at present felt in the curriculum, where the relation between what is done in the basic and in the lower secondary stages of schooling reveals acute discontinuities. Unless much closer co-ordination can be effected, there seems to be a case worth examining for creating and maintaining a single administrative command for the whole basic school system (i.e. now to grade 9) divided into appropriate sub-sections.

A significant percentage of the officials employed by the Ministry are teachers seconded from schools and post-secondary institutions. This inflation has been encouraged by the fact that seconded teachers do not count against the regular civil service establishment. While it is true that the administrative system in many countries is often justifiably criticised for being overwhelmingly in the hands of officials who have never been teachers, it seems that Portugal may perhaps have gone too far in the opposite direction and that it would be desirable to reduce the number of seconded teachers. Having achieved this goal, however, it would still be necessary to establish an induction training programme in administrative techniques for seconded personnel and to ensure that the duties assigned to them are consistent with their professional experience and technical abilities. It goes without saying that the permanent or full-time staff should consist of administrators who have received very thorough training.

Planning and management

The Ministry, as now structured, appears to lack adequate capacity for good policy analysis, diagnostic and long-term planning and evaluation. Budget planning is the responsibility of the Directorate General for Educational Personnel, whereas planning in the classical sense falls to the Bureau for Studies and Educational Planning (GEP). Since decisions concerning the allocation of resources are involved, comprehensive planning information would seem to be essential. It would therefore be more appropriate for the Minister to rely on a single planning unit which would be responsible for advising him on the desirable size of the aggregate budget and proposing options for its allocation. Such an approach assumes particular importance in view of the long-term perspective for implementing the new educational reforms.

The existing machinery for policy analysis is weak and so is the educational research base. Both need to be strengthened so that the various sectors of the education system may be developed at a sustained rate and with a rational balance among them. The Bureau for Studies and Planning was first developed under Simao, an active, reformist Minister of Education, as the engine of change for the education system. Its planning function was critical and it disposed of a large budget for experimentation, particularly of an "action-research" character, extending into curriculum innovation. After the revolution, GEP lost its previous eminence and centrality and seems never to have recovered it, even though its director still ranks as a Director-general. Its most consistent service in recent years seems to have been "school-mapping". Its role and status need to be reconsidered. The prime need is for a major, non-political, *bona-fide* research and development unit. To that end, there may be a case for distinguishing more carefully which of its functions are highly technical, and relatively "neutral", and which lie so close to the Minister's work in reform that they may need absorption into a more obviously "political" part of the Ministry.

As in several other OECD countries, there has been a marked decline in the readiness of the Inspectorate to exercise its traditional "judicial" function, whether in grading individual teachers or in evaluating particular schools. Instead, inspectors have adopted less authoritarian roles. They have emphasized, on the one hand, their support to teachers (advice, in-service training, leadership in compiling new curricula and related learning materials) and, on the other, their capacity to provide expert advice to the Minister (surveys, reviews, policy recommendations) towards the improvement of the education system. This polarization in the role of the quondam Inspectorate has resulted in an institutional separation. In 1980, the Inspectorate was re-formed as a body directly responsible to the Minister, charged with providing overall advice about (and in this sense supervising) the education system, including the most cost-effective disposition of the limited funds available. We think that this is an essential function and that it should be rapidly developed. However, we were left in some doubt whether, and if so how, the more traditional supervision of schools, often devolved from the central Inspectorate in Member countries, was being effectively continued in Portugal.

It is generally agreed that the Ministry's capacity for compiling and interpreting quantitative data is inadequate. The introduction of a central computerised system is, therefore, a high priority. The Ministry also needs to improve the internal circulation of information so as to ensure that every directorate and unit has a greater sum of knowledge and that there is no pointless duplication of effort.

National Council of Education

Efforts were made to test public and specialist opinion on the terms of a recent Draft Basic Law on Education by inviting critical comment. This was a wise measure not only in the cause of democratic consultation but also in the cause of pragmatism. In-depth comments were made on the Draft and while some were biased, they were on the whole constructive and objective and should prove valuable when educational reforms come to be implemented. It would have been desirable to consult a much wider cross-section of the public, notably employers' associations and trade unions. This survey might be the starting point for a regular process of consultations with major interest groups, including representatives of employers and trade unions. For this purpose, we would recommend that an autonomous national council for education should be set up and that other advisory committees should be appointed as required.

Relations with other ministries and agencies

At present, the Ministry would seem to lack an effective machinery for ensuring regular liaison with other ministries, especially Labour and Housing and Public Affairs, but also Agriculture, Health and Social Affairs, the regional commissions for coordination, employers' associations, trade unions and public interest groups. The whole question of its external relations policies might well be referred for scrutiny to a working party.

Co-ordination with the Ministry of Labour

Ambiguity over ministerial responsibility for education and training in the immediately post-compulsory school years has been given a new dimension with the incidence of the high rate of unemployment among the young referred to in Chapter I. The essential basis of the traditional intervention of the Ministry of Education was the assumption that whereas it should provide for young people in full-time education, the rest, the great majority, were the responsibility of the employers since they were no longer considered wards of the state. But there are now great numbers who are neither at school or college, nor yet in employment. To deal with this unprecedented – and probably enduring – situation, new government initiatives have been taken and, often, new agencies have been created. As in several other OECD countries, their relationship with the Education Ministry have been marked by ambiguities, inequalities of treatment for young people coming under the aegis of one or the other, and considerable tension. In embarking on a major expansion of secondary education, the Portuguese authorities must necessarily reconsider the customary divisions between the responsibility of ministries and within ministries, to decide how well these now fit present needs and future plans.

In the short term, it is essential for the Ministries of Education and Labour in particular to work closely together with a view to implementing measures to reduce unemployment and under-occupation among the young. A co-ordinating structure exists at national level but does not seem very effective. At local level, where practical measures necessarily have to be taken, there seems to be little or no co-ordination owing to the lack of a regionalised administrative infrastructure in the field of education. It would therefore appear to be of the utmost urgency to create an effective co-ordinating structure between the two ministries at national and local levels.

In the longer term the two Ministries will need to work on the basis of harmonized objectives and to adhere to a common plan. The gradual introduction of reforms with respect to lower secondary, upper secondary and post-secondary education should take account of fluctuations in demand on the labour market and reflect appropriate curricular reforms and a rational breakdown of responsibilities between the two Ministries as regards vocational training. Complementarity of planning and funding is particularly vital at the upper secondary level.

Co-ordination with employers' associations and trade unions

The scope for action by the co-ordinating machinery in the field of education and training should logically encompass employers' associations and trade unions. At present, however, it seems that employers and trade union leaders are seldom consulted at national level – at any rate not by the directorates, other than the Directorate for Adult Education – and hardly at all at local level. The strengthening of relations between the Ministries of Education and Labour might well be combined with measures to involve employers' associations and trade unions in systematic consultations, especially at local level.

Co-ordination with the Ministry of Housing and Public Works

When compulsory schooling is formally extended from six to nine years, the authorities will have to contend with an increase in the number of pupils. The fall in the birth rate is affecting Portugal just as much as the other countries of Western Europe. The effects are already evident insofar as primary school enrolments are concerned, although they will not be noticed at secondary level owing to the extension of compulsory schooling. It is inevitable, moreover, that the increase in pupils in compulsory schooling will soon lead to a sharp upturn in the number of pupils in upper secondary education. Regional disparities and the distortions existing between situations in rural and urban regions will foster for a long time to come the emergence of additional accommodation requirements, of significant proportions in certain regions. The problem of accommodating the increasing number of pupils will have a particularly sharp impact.

Indeed, there are ample signs of such stress already. It is clear that many existing school premises do not satisfy present educational requirements and call for urgent improvements. Many towns are already educating groups of pupils on a shift system.

In short, Portugal is faced with a ten-year adjustment programme of extraordinary magnitude and complexity for a small country, since it has to meet an increase in accommodation requirements at the same time as making qualitative improvements to reduce disparities among secondary education institutions. The crucial question is whether or not the necessary financial resources will be available. On the assumption that they are, the Portuguese authorities will have to ensure that their country turns such investment to advantage and benefits from the lessons to be learnt from other Member countries that have had in recent years to cope with a steep rise in the numbers of pupils and that are now left with surplus accommodation.

A well-thought out and rigorous planning framework is clearly necessary for the purpose of establishing suitably equipped institutions at the right time and place. Such a programme calls for:

- the construction of new school premises, for which the Ministry of Education is responsible;
- the restructuring of existing school facilities by renovating and transforming existing premises;
- the use of all other accommodation potential available, either by renting buildings to be used as schools or by converting premises hitherto used for other purposes.

In order to carry out the last two operations, steps should be taken to promote initiatives by, or assistance from, local and regional bodies.

It may be asked, however, whether the existing arrangements for planning and carrying out such a programme are entirely adequate to meet the requirements. The Ministry of Education, while responsible for planning the programme, does not in fact have freedom of choice in regard to sites, architecture and construction, where responsibility lies with the Ministry of Housing and Public Works, which is also responsible for the construction of universities, hospitals and other public buildings. However, owing to the urgency and scale of the requirements, the Ministry of Education has been put in charge of the construction of temporary premises, the renovation of existing buildings and the conversion of certain premises for educational purposes.

This system of shared responsibility evidently calls for agreement on the type of buildings and sites, in addition to very good co-ordination. It seems, however, that the Ministry of Housing and Public Works applies different criteria from those used by the Ministry of Education and that the co-ordinating machinery is weak. In selecting a building site, for example, the Ministry of Housing and Public Works is influenced by the price of the land and savings on costs, whereas the Ministry of Education gives precedence to accessibility to pupils. It would be essential therefore to reappraise the existing objectives of educational building policy and examine the effectiveness of the system now used and its value in terms of the education system. The experience acquired by other countries clearly shows that the education authorities must have full responsibility for school facilities (planning, funding, choice of sites, architecture, building standards and programmes) if the measures taken to promote education are to be qualitatively sound.

III

THE SCHOOL SYSTEM

The main structure of schooling is set out clearly in the Background Report as follows:

i)	Pre-schooling	age 3-6
ii)	Primary (compulsory)	four grades from age 6, i.e. approximately age 6-10
iii)	Preparatory (compulsory)	two grades, i.e. approximately age 10-12
iv)	Secondary (unified general course)	age 12-15
v)	Secondary (complementary course)	three grades, i.e. approximately age 15-18

At present, compulsory schooling officially consists of the completion of four primary and the two preparatory grades, or the attainment of the age of fourteen. However, there is a proposal before the Assembly that the compulsory basic school should extend to include the first three "unified" grades of the present secondary curriculum – that is, an increase from six to nine grades of schooling, or to age fifteen, whichever occurs first. All the political parties are agreed on this proposal and from the representatives of the numerous organised agencies and groups we met we heard no opposition to it, though there were several caveats and doubts about the execution of such a policy. We take it, then, that the extension of basic schooling to nine grades (or to age fifteen) is certain, and that perspective is adopted in the comments which follow.

Most implications of the proposed extension of basic schooling (some of which are discussed later in this chapter) would apply in any country. What needs clarification here, by way of a general introduction, are some background factors particular to Portugal. Heavy settlement in coastal regions has left great tracts inland lightly populated. The necessary tradition of primary education is that a single teacher should be prepared to teach a range of subjects and skills to a "class" of children whose ages and abilities may cover a wide range. Within this tradition, even very small villages in Portugal sustain their own primary school. Post-primary education, however, is taken to need specialized teachers and a greater homogeneity of ability and age among children comprising a class. The number of specialist teachers, and of reasonably homogeneous classes necessary to constitute an efficient school, requires the concentration of hundreds of children in a single place. The more specialist the teachers and the more homogeneous the classes, the larger the schools will be. In Portugal, teacher specialisation is extreme: there is a marked resistance among teachers to accept that even at the two "preparatory" grades (eleven and twelve year olds) teachers should be licensed to teach more than the single subject in the curriculum which they have studied intensively. There is now an official determination to arrange teacher training so that it provides a somewhat wider competence, and teacher opinion will doubtless follow. Rather smaller post-primary schools will then become theoretically possible.

However, there is a more serious inhibition to the seeding of country areas with preparatory (and now secondary) schools which is much more intractable. The Portuguese network of minor roads is very poor. In passing conversation, an eminent politician remarked that the most lasting failure of Salazar's forty-year rule might turn out to be his failure to build an infrastructure of roads at the time when conditions in the country would economically have allowed it. The lack is striking, even to the casual traveller, indeed even to the "traveller" who does no more than study a map. This ineluctable fact will prevent the easy adoption in Portugal of some of the practices in Western countries – such as the wholesale busing of children to distant schools – designed to allow uniform solutions in all areas to meet educational needs. Nor does the degree of rural isolation typical of so much of inland Portugal have physical implications alone: it has had profound effects on attitudes among the population to education beyond the primary stage, and among the teachers to their postings and their willingness to stay in them.

It is because the rural sector is larger in Portugal than in most Western industrial societies, and because the very poor communications and scattered nature of settlement in large inland tracts of the country pose such severe inhibitions on establishing a network of post-primary schools, that the rural aspect of plans set out in the Background Report (which seems in places instinctively urban-minded) will receive special questioning in this chapter.

Primary education

The current difficulties in primary education are clearly described in the Background Report. Certain among them – such as absence of stability in a curriculum beset by contributions from transient working parties; inadequate pedagogic support for teachers and absenteeism – apply to all sectors of education. In order to avoid unnecessary repetition, we propose to deal with such matters in Chapter V. Here we shall confine ourselves to emphasizing one or two points peculiar to primary education.

It is a tribute to past generations that primary schools can now be found even in the remotest corners of the country. Nor has the drive to found schools in small villages yet died. New schools are added annually to the roll. However, this notable achievement brings its own problems. Such foundations do not always reflect long-term population needs, yet a primary school once built has to be suitably equipped and regularly maintained, and it must be staffed. As for staffing, two OECD researchers were once given documents for certain inland "concelhos" in the Algarve which actually listed more schools than teachers. They queried the apparent incompleteness of the lists, only to be told they were full and accurate. In such sparsely populated regions, almost all the schools consisted of a single class, and several at that time had no teacher. The same proved to be the case in remote and mountainous parts of Madeira. These field studies took place in that period of administrative confusion which followed "25 April 1974": all the same, though things are much better now, and though there is no overall shortage of teachers, we were told that there are still some schools where the lack of adequate local lodging or the absence of transport on the road (or track) to the nearest lodging, defeat on the ground, for human reasons, the optimistic assignments of the Ministry's computer.

There is a danger, of course, of drawing conclusions from isolated examples. On our visit as OECD examiners, we were generally able to see only one or two examples of a primary school in each of a span of settings – metropolitan, suburban, small town, substantial village, isolated settlement. In so far as such observation permits generalization, relationships seemed particularly affectionate, and pedagogic practice sound, with testimony to an awareness of current developments, such as – where the design of the building allows – the flexible grouping of parallel classes.

Within this generally favourable impression, however, we were disturbed by some evidence – confirmed by questioning and reading – that primary education in the remoter villages was in a state which amounted sometimes to neglect. The difficulties of a teacher – often a young woman in her first posting – who must take care of all the children from the village, in an age range from six to eleven or twelve, across four grades, in a single classroom – such must count among the more challenging tasks faced by teachers. And it must count among the most important. It seems an unnecessary excess that one such classroom we saw should be in the small basement of a house built on a hill-side, scarcely able to contain its crowd of old desks and young children, lit by a single small window (with no electric light, as supplement), a battered blackboard virtually the only teaching aid. In this particular case, the teacher seemed confident and energetic despite the deprivations of which she was sharply aware; but for many young teachers whose first assignment is to such a post, so unlike what they have imagined and prepared for in their urban training colleges, the experience must be a trauma. Their anxiety for release to some setting less isolated and rudimentary presumably compels the authorities to change such postings frequently, and that must militate against the development of a sense of commitment and stability among teachers, and of trust among parents and children, so critical in primary schooling. We entirely credit that the school we saw was an extreme case, but the problem it over-dramatically represents is a real one. While, then, we accept and draw attention to those ills already identified by the Ministry in its Background Report, we want to urge a special priority for the needs of the small remote schools. Specifically:

- *i)* We recommend that a special Commission be set up for one-teacher schools, with a "capital" grant, and a "brief" more or less as follows:
    - *a)* to conduct a thorough survey on the ground, school by school, assessing what amalgamations or forms of grouping and co-operation may be possible between neighbouring schools;
    - *b)* to enquire into the lodging and travelling arrangements of the teacher;
    - *c)* to assess the physical shortcomings of each school in relation to an agreed list of reasonable expectations;
    - *d)* to allocate funds for the prompt remedying of deficiencies revealed under the above headings;
    - *e)* to renegotiate the requirements for maintenance of the schoolroom, for equipment, for provision of the teacher's lodging, with the responsible local authorities, ensuring these requirements are clearly understood;
    - *f)* to make arrangements for the regular visiting of, and reporting upon, each school by the district's "délégation pédagogique", so that the rural teacher is properly supported and so that the schools, once brought up to a reasonable standard by the actions of the Commission do not then lapse unnoticed.
- *ii)* We think the Ministry should discuss with the Inspectorate such modifications to the existing patterns of inspection as may seem necessary to supervise the maintenance of one-teacher schools in a proper condition of efficiency.

iii) We suggest the Ministry should arrange some research into the recent experiences of a sample of schools – for example, into staff turnover and into absenteeism – to see how far these relate to repetition and failure rates.

iv) We think the Ministry should investigate the value of differential payment, or special weighting in a career structure, to make longer periods of service by teachers in smaller schools more attractive (such has been the practice, for example, in New Zealand).

The preparatory grades (5 and 6)

It was not until 1964 that education was made compulsory beyond the completion of the four primary grades or the attainment of the age of 12, up to the present requirement of six grades or the age of 14. The first generation of children to benefit moved into the preparatory schools only in 1968. There was already at that time, of course, a substantial minority of pupils who added a fifth and a sixth grade voluntarily. Some did so by staying on at their primary schools, since many of these ran a recognised "complementary course"; others, living in or near towns, embarked on secondary schooling. When grades five and six were officially dubbed "preparatory", the aim was both to make attendance universal, and also to constitute these grades as a "cycle", distinguished by aims and characteristics which neither the "complementary course" nor the early years of secondary school attempted to achieve.

These purposes have been embodied in generously proportioned buildings, and an enlightened curriculum. During the seventies, the preparatory schools were understandably the focus of special efforts by the inspectorate who did much to institute good practice, and to spread it by experimental courses, special journals for teachers, in-service training and frequent school visits. The establishment of preparatory schooling has been well conducted in terms of quality, as well as in the more easily measured aspect of quantity.

Yet the preparatory system is now all too obviously under great and disquieting strain. One major source of trouble has been its initial success. Calculations of demand have almost always proved too low: indeed, schools have often been over-crowded from the day they opened their doors. Many schools have since added a second day shift, and some (to meet the needs of those employed during the day) provide a night course. Then – as is the common experience in all countries – the availability of this stage of schooling has led to an increased demand for the next. In urban areas, this pressure is translated into new or enlarged secondary schools; in more rural areas, however, the new preparatory school is often the only building suited to post-primary schooling. So it sprouts grade seven, then grade eight.

Now there are many examples of complete secondary schools (up to grade 10) sharing the preparatory school building. One such school in multiple use remains sharply in our memories. Desks and chairs in classrooms meant for children not yet in their teens had to be squeezed into by young adults, and the rest of the equipment was equally inappropriate. A small covered play space was crammed and, we thought, possibly dangerous. Of course, every country has particular examples of over-crowded schools and battered schools. No doubt adults are more worried by damage and disrepair than young people, and visitors to a school may well react more sharply than inhabitants of it – we are all mercifully protected by the human propensity to adjust to circumstances, to grow oblivious of what at first vividly offends us. However, there are familiar economic consequences to poor upkeep. When a structure begins to disintegrate at weak points, nature has a way of finding them out and of hastening the process of collapse: so too have the young. Further, the frequent complaints we heard from the administrators, teachers and parents about dilapidation, crowding, growing disorder and vandalism, made us wonder if the excessive use of buildings had passed well beyond visual or even practical discomfort, to the point, in some cases, of actual demoralization.

We are in no position to judge whether the problem is worse at one level of schooling than another, but our own brief experience certainly made us read Tables 16-17-18, which illustrate the multiple use of preparatory schools, in human rather than merely statistical terms. We would therefore urge:

i) that the present annual distribution of resources betwen the maintenance of and equipment for existing buildings and the erection of new buildings (sometimes, it seemed to us, to grandiose specifications) should urgently be re-considered.

It seems that the provision of preparatory schooling is still far from complete. Unfortunately, the statistical tables to the Background Report do not enable us to deduce what percentage of young people who complete primary education in a given year, and are less than fourteen, fail to go on to preparatory education. Theoretically, none: but we were told that the figure was not far short of 20 per cent. That this may be the right order of magnitude, at least, is suggested by Table 16, which shows that some 27 per cent of young people do not reach the point of presenting themselves for the terminal examination in grade six. Providing compulsory schooling for the final percentages of an age group is, of course, increasingly more difficult and/or more expensive as one approaches the theoretical maximum. The last two or three per cent, indeed, may defeat the most willing and generous endeavours.

The greatest part of the (suggested) 20 per cent shortfall in preparatory schooling is doubtless located in the remoter areas. The figure would be much larger were it not for "ciclo preparatorio-televisao" (CPTV). This is the only large-scale use of an integrated, monitor-and-television instructional system at school level to be found in Europe. It now serves some 58 000 children in 1 150 "posts". We saw a post in operation in a village so far removed from any nearby town that it would be hard to conceive of grades five and six being "delivered" for children there by other means, except those involving higher costs, both in economic and in social terms – such as by bussing them over long distances to school, or by boarding them away from home. What surprised us, however, was to discover the extensive use made of CPTV in town and suburban areas – a comment, presumably, on the over-crowding of the preparatory schools. In effect, numerous primary schools are being used in the afternoon as preparatory schools; were it not so, the inadequacies in building provision we have already noted would be yet worse.

CPTV, then, is playing a significant role in towns as well as in rural areas, and it will be the essential instrument for reducing that part of the "20 per cent shortfall" occurring in the more inaccessible parts of the country. Greater investment in buildings may one day justify the closing of those CPTV posts where there is reasonable access to direct-teaching schools, then hopefully less insufferably crowded: but in rural Portugal as it is, with a poor infrastructure of roads and large tracts thinly populated, CPTV seems for a great many locations the only realistic solution to a very difficult problem. We therefore recommend:

ii) that an active policy should now be adopted to establish the remaining schools and CPTV posts required to complete the network of provision for preparatory education.

Given that CPTV is so unusual a pedagogic device, we were not surprised to hear some hostile remarks about it from teacher union representatives. It is from the unions, doubtless, that one of the political parties has derived the policy of abolishing CPTV. Such opposition runs counter to evidence of strong support for the system in rural areas, and seems to be based on hearsay and inclination. We understand that an "evaluative review" of CPTV was completed, with technical assistance from OECD, between 1974 and 1976. However, this was the period of maximum disturbance both in the direct teaching schools and in CPTV so that any scientific evaluation was impossible. Now that both forms of preparatory education follow the same curriculum (which was not previously the case) and have experienced a considerable period of relative stability, it should be possible to make sufficiently valid comparisons between the two to make discussion about CPTV better informed and more illuminating. Such an evaluation, incidentally, is likely to be of considerable interest internationally, especially in those countries faced with comparable difficulties in extending compulsory post-primary education into inaccessible areas. We therefore recommend:

iii) that the practicability of a comparative evaluation of educational progress among selected samples of direct-teaching and CPTV students should now be investigated; together with a study of the comparative success of the two systems in retaining pupils up to grade 6 and beyond, and other relevant issues.

We noted also three possible causes for the present separation (and consequent suspicion) between the two modes of preparatory schooling which, it seemed to us, might gradually be modified. First, the routine of learning in CPTV is *invariably* different, in all subjects, to that of the direct-teaching schools; instruction is *always* given by the television teacher, the teacher/monitor in the classroom being confined to forms of subsequent "exploitation". Second, the teacher/monitors in CPTV are recruited among primary teachers: those in direct teaching are qualified in particular subjects, their "tradition" being analogous to secondary rather than primary habits. Third, CPTV is run by a directorate-general in the Institute for the Technology of Education (ITE), separately from the administration of the direct-teaching schools by the Directorate-General of Basic Education (DGEB).

These three points of distinction have, of course, a logical coherence. If teacher/monitors are not qualified to teach any one subject at the preparatory level, then they must function in some other professionally specialised mode; they must be administered and supervised by experts in this mode. We suspect that all this is a reflection of an exaggerated specialisation which has had several other unsatisfactory effects. For example, as we already noted in this chapter, the need to gather so many specialist teachers together means that appropriately large numbers of children must be collected for them to teach, which, outside the well populated areas, is a severely limiting factor on where direct-teaching schools can be established. Then again, children accustomed for the most part to one or two teachers in their primary schools are suddenly exposed to a plethora of specialists – a source of criticism from several groups we met. The apparently alarming statistics for the number of "unqualified" teachers is of course the reverse of the stringent theoretical specialist requirements for qualification. We shall later note (in the section on teacher training in Chapter V) some encouraging developments which reflect a less exacting view of the quantity of specialist training necessary (however much may be desirable) before a person is qualified to teach a subject to eleven and twelve year olds. In parallel, there have been tentative school-mapping experiments which allow smaller preparatory schools. To such movements we would like to give warm support. In addition, it should be possible (initially on a restricted, experimental basis) to divide the curriculum in a CPTV post in such a way that, although a majority of the subjects continue to be taught in a close integration with broadcasts, a small group of subjects might be taught in the normal classroom manner. This would provide greater variety for both monitor and children in the CPTV posts, and would allow more flexibility in the daily disposition of time. We believe also that the two modes of preparatory schooling might with advantage come under a common administration at some suitable future time. Perhaps that administrative change would be best envisaged as part and parcel of the larger change under discussion whereby many aspects of schooling may be administered regionally rather than centrally. In line with para. 91 in the Background Report, we would then recommend:

iv) that means of reducing the separation of "direct-teaching" and CPTV modes of preparatory schooling be closely examined, in terms of pedagogy, teacher training, qualifications, and in terms of administration.

Secondary education

Secondary schooling extends from grade seven to grade twelve. The twelfth grade is a very recent addition, a substitute for various extemporizations between the April revolution and 1979/80 to fill a year between what was then the end of secondary schooling and the start of higher education. That so many as 80 per cent of secondary schools should already offer the twelfth grade is a remarkable achievement, and represents the vigorous execution, in terms of building, equipment and staffing, of a difficult but necessary decision.

The OECD examiners, as it happened, all came from countries in which "lower secondary" education has been compulsory for a few decades. We had some difficulty in making sure that our reactions were apt to a situation where it is not yet compulsory at all. The crucial questions about secondary education in many Western countries are about how to improve the quality of an established secondary system; in Portugal, they are about the shape a system not yet ossified should assume. We think, for the most part, we should not spend much time on criticising details of present secondary schooling arrangements, since these belong to a disposition likely soon to be changed. Instead, we propose to take our cue from the secondary school section of the Background Report. This asks for "an "unequivocal" definition of the place and aims of secondary education within the education system". That is a large demand and few would have the confidence to answer "unequivocally", but we agree that, at this juncture in Portugal, what matters are major issues of educational policy, and it is at this *strategic* level that we propose to offer some tentative contributions.

The adoption and timing of a policy of compulsory secondary education

A draft Law put forward for general discussion by the (then) governing Democratic Alliance party contains the proposal that compulsory schooling should grow from the present six grades to nine (or to age 15). We found that the educational plans of every political party and every "pressure group" concurred with the proposal. And so, let us say at once, in principle, do we. We propose to suggest some caveats and comments, but we do not doubt that – given Western norms of urbanisation, employment and democratic expectation – "education" of some sort should be available to all, up to, say, the age of fifteen.

One such caveat we have already raised, earlier in this section. The *existing* system of compulsory education shows some dramatic signs of underinvestment. We have mentioned three obvious manifestations: the condition of the one-teacher primary schools in remoter areas, the excessive utilisation of the physical plant of some preparatory schools, and the incompleteness of the preparatory network. Supposing a new Basic Law legitimises the extension of compulsory schooling to nine grades, there will be a strong case for setting a date for implementation that does not result in such a diversion of attention or resources from the first six grades that these remain in their present unsatisfactory state.

In the previous chapter we suggested that the time-scale for implementing the reforms under discussion should be of the order of ten years. With regard to the extension of compulsory schooling we are inclined to think that total time may be less significant than ensuring that once implementation is begun, completion should be reasonably quick. There are reasons of morale for this: present inequities are supportable because familiar, but once an obligatory system is instituted those a long way down the queue will feel hard done by. And those low in the queue will prove, as always, to be those in rural areas. The percentage of the age cohort (some 60 per cent) that already has the opportunity to attend grades six to nine is certain to comprise, almost exclusively, residents of cities and suburbs and large regional towns. In our numerous meetings, we heard frequent expressions of egalitarian sentiment applied to the division between "middle class" and "working class": we would like to urge an equal sensitivity to the division between "urban" and "rural". Unfortunately, this division is geographical rather than social and has not lent itself to embodiment in rival philosophies, nor has it been reflected into political parties. The fact remains that collecting enough children to constitute efficient secondary schools will prove even more difficult in rural areas than has the equivalent at the preparatory level, nor is any comparable use of television likely to ease the problem. Unless a clear policy for the rural areas is worked out and unless "positive discrimination" is adopted in carrying it out, the towns will once again benefit long before the remoter countryside. Thus, a protracted programme of secondary school provision will actually serve to increase rather than to diminish that urban/rural inequality, the extent of which is a disturbing feature of Portuguese life in general and not least of Portuguese schooling.

We have another worry about too long a period of actual implementation. The word "obligatory" applied to schooling has, of course, different meanings according to whether adequate numbers of school places are available. When they are, it means everyone (bar some few recalcitrants) attends: when they are not, it means some (it may for a while be a minority) are obliged to attend, others are not. But there are practical implications in this difference. During the long period of partial provision the vigour of enforcement is bound to be muted. More serious, the needs of those not actually included in secondary education will seem to require no special attention – the argument will be that the decision to make provision for everyone has been taken, the problem is simply one of unavoidable delay. Paralysis in making provision for those left out, while – over many years – a theoretically obligatory network of provision is completed, has been in evidence during the long period during which the preparatory grades have been established. Yet the spread of grades-six-to- nine schooling is, in its physical requirements and pedagogic character, a more difficult enterprise, likely to be slower. We think there is a strong argument for giving more thought than is so far evident about what is to be done for those young people for whom grades six to nine remain unavailable, or (during a period in which – as with preparatory cycle – wholesale over-use and over-crowding will be typical) whose school avoidance is by tacit consent connived at. The present alternative of "parallel" evening classes will doubtless continue and grow: but these at present are confined to young people already over the official age of compulsory schooling and already employed. Towards the needs of the rest, the present policy seems to be one of neglect.

The character of compulsory secondary schooling

Cynics might well argue, of course, that a system of compulsory secondary education works best if combined with rather lax enforcement. For it has to be said that in all Western countries with compulsory schooling till fifteen or sixteen, the reluctance of a minority of pupils to attend school is vehement and disruptive. Nor is it by any means unquestioned that, if forced, they learn more of value *to them* during hours spent in bored confinement in a classroom than in the fields, the shop, the workshop, or even the streets. Of course, no matter what education is provided there will always be a proportion of recalcitrants, but the success of a system of compulsory schooling must to a major degree be measured by what is done to keep this proportion small. Moreover, such obvious "misfits" serve the function of those mice which mine-workers used to take with them down the pits: they provide dramatic warning that the air is far from healthy even for those with larger tolerances. For the most part, alienation from schooling stops at inattention and poor achievement; in the contemporary social climate, however, the amount of school violence, school vandalism and large-scale truancy has soared. It is not, then, just the problem of the permanent absentees, the drop-outs, (and the left-outs) that needs attention, but the character of the education provided for those who remain within the system.

The history of schooling in all Western countries is that of an amenity originally accessible to a very small elite, being extended by church or state or private benefaction to greater numbers, but still to a minority drawn generally from those children quite talented academically, and/or supported by bookish and ambitious homes. The extension of secondary schooling to all children occurred in Europe only after the war. Each stage has been seen as the extension of an *established* benefit to additional numbers: in parallel, established curricula and established pedagogic styles have been carried over. These often prove ill-suited to compulsory, universal education. Attempts at reform have not only had to cope with the conservatism of educationalists, teachers and parents, but with an insistence, on the one hand, that the principle of equality requires everyone to have much the same provision, and, on the other, that the sacredness of "culture" requires such provision to be, broadly, of the traditional kind. The resulting tension has been reflected in a drive towards comprehensive, "undifferentiated" schooling, and also in the dominant character of that schooling being academic.

We do not want to suggest that there is any obvious or settled solution to this central dilemma about the purposes, and therefore the appropriate practices, of compulsory secondary schooling. We were struck, though, by what seemed to us a misplaced assumption that the age of compulsory schooling in Portugal could successfully be raised simply by a more extensive application of present practice. We realise that a good deal of enlightened effort has gone into devising a "unified curriculum" to replace the old system of sharply differentiated secondary schools. We think this unification right and inevitable. It is the corollary not only of egalitarian sentiment but of the impossible expense of providing a full range of alternative schools in every area and the difficulty of forcing young people to make a fixed choice between limited alternatives at an undesirably early stage. Our worry, then, is not with the principle of curriculum unification (up to the ninth grade) but whether, in relation to a new situation, that curriculum will now need fundamental revision, and whether the style of "schooling" should be reconsidered.

For example, we noticed (with respect) that a place has been made in the unified curriculum for some practical activities. These have been given the colour of vocational orientation. We emphatically favour a more practical education, but we wonder whether at this stage, the "vocational" may well be the enemy of the "practical", rather than its ally. We saw two examples of what seemed to us a misplaced vocationalism at the extremes of intensity and superficiality. One admirably conducted secondary school (which had somehow managed to retain its technical character from the days of differentiated lycées) had introduced an "experimental" programme under which twelve and thirteen-year-olds learnt, *inter alia*, to operate elaborate textile machinery, even Jacquard looms. More typical – so we understood from enquiry – was the school in which, for lack of adequate resources and teacher expertness, "vocational" meant the usual classroom lectures and reading, plus occasional visits outside the school, *about* a particular vocation. Of these two means of fulfilling the curriculum requirements, in the first, practical understanding and experience has been displaced by narrowly vocational training, and in the second by yet more academic instruction. In either case we think the vocational "shadow" is being mistaken for the practical "substance".

For, in general, the practical spirit seems to be singularly lacking in Portuguese schooling. The sciences, for example, remain lectures and demonstrations about science through the preparatory stages and well into the secondary. The notion of experience with materials and tools appears in the preparatory curriculum, but the amount of time made available, and the equipment available, undermines the whole conception. The curriculum remains in actual character (as distinct from its appearance on paper) profoundly academic and bookish.

Such a disposition is, of course, understandable in a system which deals with only some 60 per cent of the age group, even in the earlier secondary grades. In such circumstances, secondary schooling is bound to be urban and middle class and (especially in a country in which professional and bureaucratic employment have so overwhelmingly large a place in middle-class aspirations) geared to the requirements of higher education. We do not think this academic style will remain satisfactory even for the elite minority: we are wholly confident, from experience, that it will not work if secondary education is now compelled upon the mass of young people.

For the critical importance of the "practical" in schooling has little to do with vocational preparation. In contemporary society, employment is so varied in character, its availability so unpredictable, that there can be no confident long-term linear connection between rudimentary skill training and future utilisation. What the "practical" offers in education is *intrinsic* motivation. Music and painting, creative technology, work in wood and metal, the crafts, athletic skills and the rest, even at school level, are not described in linguistic concepts to pupils; they are practised directly by them. Such activities are based upon an interaction with tools and techniques to achieve effects which are largely self-evident or can be clearly demonstrated. They relate to daily experience, not to future occupation; they are "applied", not just theoretical. Sometimes teachers strive to inject a similar directness and activity into conventional subjects, usually through projects and similar devices, but beyond the primary stage the habits and structures of Academe work against their efforts. We would urge, then, that before secondary schooling is made compulsory for all, a very thorough assessment is made of how the curriculum can be substantially infused with the "practical" – by which we do not mean that a small portion of time should be found for that polar extreme to the academic, namely the vocational. And we should perhaps make it clear that we do not conceive the "practical" as a resort for the less able. We entirely support the notion of a unified curriculum to grade nine, differentiated only in the sense of choice between alternatives of comparable "social" value. For at present the academically able seem to us also to suffer from a surfeit of bookishness. A traditional scale of values survives in Portugal, more strongly than in more industrialised countries, which over-values knowledge and skill in the manipulation of symbols to the detriment of technical skills and capacity in execution. That reflects a relatively undeveloped economy and a hierarchical social structure: it is not likely to persist into the future.

While a much stronger infusion of the practical should make the day-to-day experience of secondary schooling more attractive to the great majority of the young, there is certain to remain a proportion who will find protracted schooling of any kind repellent. In some countries, schools have begun to accommodate "work experience". Some believe this should be part of education for everyone: often it is so difficult to arrange that it stops with arrangements for a restive minority to work for part of the school week with local employers, under "licence" as it were, with due checks to ensure that an element of on-the-job training is included. With the coming of mass youth unemployment, comparable arrangements have become commonplace for those who have just left school: but in the United States, in France, in Britain – and doubtless elsewhere – similar arrangements have been tried for those still *at* school. More general considerations aside, for specific individuals this may prove a valuable alternative to disruption and truancy (an Inner London Education Authority scheme was actually labelled "Truancy Diversion"). But these "hard cases" apart, a licensing arrangement in Portugal might extend to those young people who will theoretically qualify for obligatory secondary schooling but for whom, while the network grows, no provision will actually be available, i.e. the "left-outs" and "drop-outs". We have already indicated that the provision of some "interim" and "alternative" education/training for these absentees seems to us a singular lack in the recognised areas of state action and responsibility. For these young people not attending school the incentive is a job, of course, and directly vocational training can properly take precedence (as emphasized below, in Chapter IV).

Ways of providing practical facilities

Aspiring to make schooling more practical in its character is one thing: providing the facilities – teachers, spaces, tools – is quite another. No doubt one major reason for the continued dominance of class teaching is its unrivalled convenience and relatively low cost as a means of occupying the young. The obvious way to make a change is to equip the *schools* with practical facilities, but that may not be the most economical and realistic course for Portugal. It has been the expensive and far from satisfactory route taken by the Western democracies. The nature of schooling has been marked by a step-by-step extension of a narrowly unified secondary syllabus (at one time the classics and little else) to include not merely numerous alternative classroom subjects, but subjects which cannot be pursued by book and blackboard. Gymnastics and games, art and music, experimental sciences, experience with wood, metal and electronics, numerous crafts, certain vocational skills like typing ... all these, and other new subjects, require expensive specialist provision. The continual multiplication of such activities has meant that most schools – even after lavish equipping – still have to go outside for certain facilities. For example, schools in towns may need to arrange to use the local swimming pool at certain times, and to negotiate with the instructor at the pool to teach his skills to the young. Similar arrangements may well be made for, say, individual instruction in certain musical instruments; and so on. In short, every school system draws a line somewhere between what it tries to provide from within its teaching force and physical resources, and what it "recognises" but seeks outside in the surrounding locality.

Whereas the Western tendency has been to make the school as inclusive, multi-faceted and well-equipped as possible, with a crowded curriculum occupying ever longer hours, some Eastern block countries have taken a different route. In Russia, for example, the compulsory secondary school is comprehensive, choice between subjects being very limited, and the pace of instruction geared to ungraded classes. But the school day ends at (late) lunch. The facilities for music, art, chess, electronics, dance, athletics, drama, a wide range of specialised sports, crafts, "hobbies" and so on, in profusion, are concentrated in "Pioneer Palaces". That young Pioneers are morally "induced" to attend the Palaces (as to adopt other behaviour patterns) is deeply distasteful: but we are concerned here exclusively with questions of the location and use of expensive facilities. The Palaces organize numerous "classes" in what are normal classroom subjects – foreign languages, geography, history, maths and physics for example, but these are run as voluntary "circles", and are therefore made as "practical" and attractive as possible. It may seem in terms of expense that to make such provision in a Pioneer Palace is merely to displace the equivalent expenditure from the schools, but there are differences worth reflecting upon. In a city, such a concentration of expensive resources provides a range of choice which each school cannot match. The Pioneer Palaces are open all day long and well into the night. They do not close at weekends or for school holidays. They are staffed not only by some full-time teachers and leaders, in rotation, but by numerous part-timers, and by volunteer adults in the evenings and at weekends. People genuinely expert in special techniques and enthusiastic about particuler "hobbies" help educate the young in an unschool-like setting. Above all, the ethos is a complement to the (equally valuable) ethos of the school. In the school there is, properly, a dominant concern for equal treatment, for a wide and balanced curriculum for all, such as will keep the subsequent stages of education open to as many as long as possible. In the Pioneer Palaces, to the contrary, the emphasis is placed upon personal selection among a wide range of heterogeneous possibilities, on achieving excellence in that specialism, on learning in an informal and active style, on the replacement of fixed "classes" and courses by progress at a pace set by the aptitude and enthusiasm of the individual. Both ways of educating make sense, but it is not easy for both to be accommodated in the same framework.

In Portugal, the disproportion between resources and the pressure of numbers seems certain to result in secondary schools, especially if they are made obligatory, having to run a two-shift system, half-a-day each. It may make sense to recognise this officially and to take advantage of a potentially profitable adversity. School might be confined to half the day, additional time then being spent at centres where resources for expensive specialisms are concentrated and intensively used. Where necessary – as would be the case in rural areas – such facilities might be concentrated in an annex or section of the school, and still be used in the more open, flexible manner described. Indeed, we heard with interest of one such experiment having been authorised in a rural school. Such specialist centres or annexes would seem to be a fit subject for contribution from other ministries than Education alone.

After compulsory schooling ends

As with obligatory secondary schooling, so with the optional, "complementary" grades we propose to confine ourselves to the main "strategic" questions which need consideration.

In the larger industrialised democracies, the upper secondary school is paralleled by other "educational" structures for young people of the same age – that is, roughly sixteen to nineteen. First, industrial organisations provide a wide variety of practical training; second, the education authorities have organised a system of technical or vocational colleges.

The weakness of such compensatory structures has been reflected in Portugal in the recognition of some *32* vocational specialisms (and a couple of years ago, we were told, there were many more) ***within the secondary system.*** The question is not whether so many specialisms should be recognised – commerce and industry are minutely variegated – but whether their inclusion within the framework of secondary schooling is effective and wise.

We may start by noting one minor disadvantage. Attempts to rationalise the secondary curriculum in Portugal regularly run into the determination of the representatives of each specialism, resident at the Ministry, to fight their own corner, insisting on the full requirements of their craft. In practice, of course, far from 32 appearing in any one secondary school, (on top of the normal academic specialisms) the probable count will lie somewhere between one and a half dozen. Often the choice reflects the dominant economic activity or activities of a locality. That sounds reasonable enough. Unfortunately, the young in Portugal are no more inclined to stay where they grow up than anywhere else in Europe. The availability of employment, or their natural talents, may in any case force them to move. And we should recall that migration – from the country to the town, from inland to the littoral, from the littoral abroad – is an especially marked feature of life in Portugal. In rural areas, then, offering an "appropriate" range of specialisms is a particularly uncertain course to pursue. We experienced a delightful visit (with memorable hospitality) to a very well run agricultural – indeed, essentially vinicultural – secondary school: but its marked character must be extremely off-putting, or irrelevant, to the young people who have no interest in agriculture, or have to pretend to it in order to get secondary education at all, since no alternative is readily accessible. Obviously, the dilemmas posed by vocational specialism within secondary schooling are less acute in the cities where the available range is larger, but the Background Report notes that about 6 per cent of the small proportion of an age cohort in upper secondary education pursue the vocational alternatives, with wide disparities between subjects and regions, and the question must arise whether the effort to build them into the school system is worth while.

An alternative would seem to be an upper secondary school exclusively orientated to higher education (including the technological) and a parallel system of technical/ vocational colleges in which a wider range of specialisms are concentrated, and made accessible in ways much more flexible than the regimes of schooling allow. Access to such technical/vocational colleges, especially for students from rural areas, will require subsidy for living away from home. Further, the State may intervene to subsidise technical/ vocational training based on suitable places of employment. We saw examples of both these approaches (see the chapter on Vocational and Technical Training). The question arises whether these parallel structures to the upper secondary school are most appropriately seen as the responsibility of the Ministry of Education or of Ministry of Labour. We shall discuss this important question in the next chapter.

IV

VOCATIONAL AND TECHNICAL TRAINING

It is generally accepted that a modern national school system is responsible for providing all children in the relevant age group with a basic education, the aim of which is to equip them for an active life as citizens, as productive members of society and as participants in its cultural life. According to well-known findings, the level of a country's general education significantly influences its possibilities of economic growth. Thus the school system plays at least an indirect role in the economy. There is evidence that this is also the case for individuals, especially in view of the rapid changes that are taking place in modern society. This influential aspect of general education might reflect upon the curriculum. It could be argued that knowledge of a country's economy and the various activities that support it might enhance such an effect and therefore should be included in the overall concept of general education.

Although these views on general education and the tasks of the formal school system may be accepted as guidelines, it does not follow that the schools must assume the responsibility of preparing pupils directly for what is a highly diversified labour market. The unavoidably limited scope of a "school-system-for-all" cannot be expected to meet the rapidly changing needs of industry. The large majority of citizens must receive proper vocational and functional training outside school.

Some countries have integrated a substantial part of vocational training into the school system, leaving specialised topics to "out-of-school" institutions. Other countries have left vocational training entirely to "out-of-school" agencies or to employers. Which choice a nation makes should not be questioned by outside experts. The final outcome is not necessarily made any better or worse whatever the choice.

What is undeniable is that it should be a public responsibility to ensure that proper training be made available in all those areas which the State wishes to see developed. We deem it a part of our mission therefore to make a few comments on what we observed and learned during our visit and from the documents available, as well as to offer some suggestions as to what we think should guide future education and training policy, irrespective of how administrative responsibility be distributed.

Our first observation is that vocational training is neglected to a serious extent. Some excellent schemes exist but they are far too few. Moreover, there is a marked lack of co-ordinated action. Whereas there exists in Portugal a solid base for the development of a formal school system that can be raised up to good European standards, the majority of young people who are now leaving the system or who will soon be looking for jobs, remain unqualified. For example, those who find themselves shut out of post-secondary education by the admission rules have few outlets to pursue.

As we see it, there is an urgent need to establish a viable system of vocational and technical training above and beyond the level of compulsory schooling which aims at providing the nation with skilled workers, operators, technical personnel and managers. As no single ministry is responsible for overall planning, we recommend that a special commission be organised to inquire into the needs of this important field. It should include representatives from all the ministries concerned as well as employers and trade unions.

As we have seen, the recent reform of secondary education introduced a unified general lower secondary cycle (grades 7 to 9) and an upper secondary cycle (grades 10 to 12), which includes some provision for vocational preparation. This entailed suppression of the former technical schools, starting at grade 7 (grade 5 until 1979). We fully concur that it is no longer reasonable to oblige children at the early age of 10 or 11 to choose between general or vocational studies when that choice will determine their whole futures; in any case, such a choice is mainly determined by social origin rather than potential aptitudes. On the other hand, as we shall argue below, the suppression of the technical schools came with an abrupt impact and left a training vacuum at a time when vocational skills were in desperately short supply.

Indeed, it cannot be denied that the Portuguese education system is at present weak in preparing young people for employment. At the lower secondary level, a few hours a week are devoted to what is called vocational initiation. We have doubts about the pragmatic value of this initiation as well as the capacity of the system to provide it. At the upper secondary level, opportunities for pre-vocational preparation do not occur until grade 12. Along with many Portuguese employers, we question the practical utility of this preparation, which was originally conceived to facilitate access into the polytechnic institutes.

The Portuguese authorities themselves recognise that the post-revolutionary reform has created a large gap in the field of vocational education and training. They also recognise that the objectives of the reform may not be reached before the late eighties.

We are aware that statistical data have to be treated circumspectly. Nevertheless, even when allowances for error have been made, certain statistics are striking. At present, around 40 per cent of young people already leave the education system at or before the end of compulsory schooling (grade 6). An additional 15 per cent leave at the end of the lower secondary cycle. The number of potential candidates for vocational education at the upper secondary level appears, therefore, to be quite small. Moreover, under the present system, only a very small percentage of young people in fact choose to enter the pre-vocational 12th year. According to recent report: "Statistics for 1980 show that of those pupils who complete the two grades subsequent to the nine-year period of compulsory common schooling only 5.5 per cent at the national level and up to 8.8 per cent in the northern coastal region opt for the twelfth year of vocationally oriented education. Thus, even on the North Coast a quarter of the modest facilities available remain unused, and with regard to the small group of pupils who do choose this branch, seven out of ten plan to enter the labour market at white-collar level. For the whole of Portugal in the second half of 1981, 65 per cent of the unemployed were less than 24 years old and of those two thirds were looking for their first job. Thus, given that employment statistics published for the North Coast and referring to 31 December 1980 indicate that demand for first-time employment in the clerical, sales and services sector was at 45.4 per cent, as compared with 22.4 per cent of the area of non-classified jobs, and a mere 17.3 per cent in industry, there should be no doubt that the labour supply is ill-matched to regional demand"[6]. The consequence is that for a number of years to come three-fourths of the population will have no opportunity to receive a vocational education under the aegis of the education system and there will be a mismatch between educational supply and labour demand.

However, there exist opportunities for vocational training outside the province of the Ministry of Education, mainly under the responsibility of the Manpower authorities. Since these opportunities have been described in detail in the Background Report prepared by the Portuguese authorities for the Review of Youth Employment Policy in Portugal as well as in the Examiners' report[7], we shall describe them here only in outline.

Some responsibility for vocational training has recently been allocated to the Institute for Employment and Vocational Training (IEFP). This Institute now disposes of eleven centres, where accelerated courses, leading to recognized qualifications, are offered to adults above 18 years of age (it is intended in the near future to open these courses to young people aged over 14). There is a plan for the creation of 25 new centres with financial aid from the EEC, which should serve as poles of development in the regions, particularly in the interior, and offer more flexible training services. This will represent a major break-through, although, obviously, time must pass before the centres will be fully in operation, if only because many teachers will have to be trained to work in them. Moreover, the training offered remains narrow. We also question whether all the centres should have exclusively regional functions.

Mention should be made of a pilot experiment under the joint responsibility of the Education and Labour Ministries whereby young people, as early as the end of compulsory schooling, can simultaneously follow the unified lower secondary course, which is a qualification for further study within the education system, and acquire vocational training leading to a recognised award as well as some experience of work within a large firm. This scheme has many interesting features. Although its potential extension seems limited, particularly because of the cost factor, useful lessons may be drawn from the close cooperation among manpower authorities, industrial firms and the Ministry of Education.

Training opportunities, with or without the technical or financial participation of the Institute for Employment and Vocational Training (IEFP), are also provided in public and private firms or in other ministries, particularly in the health and agriculture sectors. When all the available opportunities for vocational training have been taken into account the fact remains, however, that the overall provision is meagre.

In their report on youth employment policy, the examiners stress that the current provision is inadequate. In 1980 fewer than 10 000 people, the majority being young adults, received any form of vocational training. Even then, fewer than half the programmes led to recognised qualifications. The total of young adults undergoing training represented at best 5 per cent of those leaving the education system. Significantly, the same proportion of school-leavers is around 50 per cent in France and 60 per cent in Germany. Given the strategic importance of the vocational training of young people in a country where approximately one third of the potential labour force is working abroad, the lack of adequate vocational education opportunities was considered a critical issue by the examiners. It is also our view that this lack represents a challenge to the Ministry of Education, whose sphere of responsibility is our particular concern.

The case for vocational education from age 14

As noted earlier, some 60 per cent of young people currently leave the education system by the age of 14 (about 20 per cent before, about 40 per cent at grade 6), that is before the start of the first cycle secondary (and another 15 per cent of those remaining leave by grade 9). Such high rates of non-attendance are attributable to many causes. The Youth Employment Review emphasised the cost factor – both the direct costs to parents of a young person attending school, and also the indirect costs of earnings foregone, or the value of labour lost to home or farm. Another important cause is the lack of conviction among parents – especially those with lower incomes – that added years of schooling will do anything to improve a young person's chance of getting the sort of job realistically open to him (or her). Consequently some young people, especially in rural areas, quit school even before the minimum working age of 14 to help in the family, and a majority look for a job as soon as the law allows. Thereby they can get not only a small income, but at least some informal training or experience and a testimonial which may lead them further.

If young people were offered formal vocational training from the age of 14 would they respond to the opportunity? In the Northern Region, the Labour and Education Ministries recently joined to provide an experimental training scheme: of the 40 per cent who would previously have ended formal education at the age of 14 only 4 per cent did so; the rest went into the training scheme. This is not surprising, for skilled workers – such as the training course was designed to produce – generally earn fully twice as much as the unskilled.

Before the revolution, there used to be vocational education from the end of primary schooling. This was suppressed in preference for a unified form of schooling to grade 6 and, for those who chose to stay beyond, to grade 9. Some vocational differentiation appears in the upper secondary and becomes marked in the last two grades (where, however, vocational alternatives attract less than 10 per cent of those by then still in school). Of course, we appreciate the human and political arguments for trying to give all young people a common education, without premature division between "academic" and "vocational" streams. Experience shows that any such "streaming" is conditioned by, and then confirms, class difference. That, incidentally, is likely to be so at whatever age the "academic" and "vocational" divide occurs, but we entirely concur with the wish to delay its appearance until grade 9. What we find unsatisfactory is that behind the righteous façade of a unified course to grade 9 in schools, there should have occurred in practice a more damaging, class-biased differentiation even than what went before. For the 40 per cent who quit school by grade 6 (no longer having even any post-primary vocational training) can search only for unskilled work. If they are determined enough, they can continue schooling while employed during the evenings – but only to take the unified course, which has no direct vocational relevance. They must therefore scrape what skill training they can from their job (a haphazard process for the great majority employed in small workplaces) or try in time to get one of the very small number of vocational training places now being created for older students and adults. In a very real sense, this seems to us more socially-divisive than were the previous post-primary technical schools in Portugal, or the permanence in some Western countries of "academic" and "technical" or "vocational" streams within the secondary school itself.

It is the usual Western practice for full-time technical and vocational training to be available at least *from the age at which compulsory schooling ends.* That principle seems to us critical, for reasons both of equity and of improving the future economy of the country. We therefore urge a high priority for vocational opportunities in Portugal *from the age of 14.* If the compulsory leaving age is raised to 15, many years will elapse before sufficient extra-school places can be built all over the country, and until then the legal requirement will not be fully effective. We would suggest vocational education being available from 14 throughout the period of gradual implementation, the entry age being switched formally to come to 15 only as, district by district, reality catches up with intention.

If agreement could be reached on the principle of providing some vocational education opportunities at this age, the question would then arise: *who* should be responsible for it? The suppression of the technical schools and the very limited provision for vocational preparation even in the 12th grade tend to suggest that the education authorities have abrogated their responsibility for vocational education. The new intention to strengthen vocational education in upper secondary education indicates that the policy has changed and that the education authorities mean to play an important role in the future. However, many in the educational administration seem to believe that at the lower secondary level responsibility for vocational training should lie outside the education system, despite the launching of a few pilot and experimental schemes.

The IEFP has ambitious plans for the training of young people from the age of 14. We have doubts, however, about its capacity to develop for this particular target group sufficient resources within the near future. Employers indicate their willingness to cooperate but, except for some large firms, stress their inability to undertake training activities by themselves. Their position obviously stems from the fact that 90 per cent of economic activities are conducted by small firms that cannot afford to make provision for the training of their own staff and are highly dependent on the availability of already trained personnel. The impression was conveyed to us that many people consider that the education authorities should assume the main responsibility for vocational education at this level, leaving to the employment authorities their more traditional function of promoting and monitoring labour market training.

Whatever the diversity of views on the respective responsibilities of the various departments of government and agencies, we would recommend a pragmatic incremental approach. Cooperation among the various agencies concerned needs to be strengthened with a view to drawing the best advantage from the resources available, particularly at the regional and local levels. It would be useful to issue a flexible and indicative framework which would allow the local echelons of the Education and Labour Departments, the regional Coordination Commissions or even industry to take initiatives on their own account.

The pilot scheme launched in cooperation between the Education and Labour Ministries and the IEFP courses extended to younger people already provide examples of possible initiatives. Other organisational arrangements might be envisaged. One arrangement could be based on the fact that most secondary schools function, and will continue to function for some years, in shifts. Students are free therefore either in the morning or the afternoon and could undertake practical or vocational training outside the schools in centres where essential equipment and scarce resources could be concentrated and intensively used – for example in an IEFP centre or former technical school. This possibility has been examined in the previous chapter in the context of providing optional practical education to complement the academic studies received by those still in the secondary school. Here we wish to emphasise that such centres could also serve those who have left school and want vocational education.

It would be theoretically possible to write into the curriculum of the whole age group a period of academic studies at a school for half the day and a period of complementary practical or vocational work at a special centre in the other half. That would retain the principle of a unified curriculum. However, any such generalised application would result, we fear, in the vocational element being regarded as "general education", with the consequence that it would not lead to any recognised vocational qualification. A properly utilitarian stress on vocational qualification we think essential. Moreover, to make practical/vocational studies part of the compulsory unified secondary course, applied to *every* young person, would require a very great expenditure. Better, we suggest to make attendance at such centres voluntary. Those still at school might have some note added to their record of their practical activities at the centres, and those who have left school could work towards a recognised qualification for entry into employment. We believe such centres would be especially attractive and supportive for those who currently leave school at the minimum age.

Clearly, in the manner of application, a high degree of discretion should be left to local or sectoral initiatives. At the same time, it would be desirable to issue a generally applicable framework of guidelines about the objectives, content and organisation of these courses. Given that no vocational education can be considered as full preparation for a specific job, it would seem essential that these courses should lead to a qualification recognised both by employers and trade unions. With respect to content, the curriculum followed in the IEFP centres could serve as a useful frame of reference since it does lead to such a qualification. These courses are very short, however, having been conceived as a form of accelerated vocational training for adults with substantial work experience.

Like the examiners for the Youth Employment Review, we would stress the need for minimum continuity between school and vocational training. We noted that most of the students in the IEFP centres had left school some years ago, so that the instructors, within the already short time available, had to devote the initial periods to teaching basic material which the students had forgotten. We feel that the duration of the courses should be doubled from 8-9 months to an average of 18 months. We stipulate "average" because to institute a standard duration for vocational education courses, which many countries have done, leads to rigidity in the system. The duration of courses should be determined according to such criteria as the nature of the skills required (some take more time to master than others) or the practical arrangements proposed (full-time vocational, combination with general studies or part-time attendance).

The idea of continuity raises the issue of the level at which access should be possible. Nobody would question that completion of the 6th grade should be a prerequisite and, indeed, an incentive to completing compulsory schooling. But access could be left open at any level during the unified course. We were informed of a proposal for a common first year (grade 7) followed by a vocational course of two years. Our advice would be not to institutionalise the entry level. We appreciate that the extension of compulsory schooling to the 9th grade in the unified course is a long term objective that will be reached step by step. Our suggestions should be considered as temporary remedies, while resources and opportunities are gradually shifted to upper levels, as school participation at lower secondary level becomes universal.

The need for technical and vocational education at upper secondary level

The present system provides for some vocational preparation at upper secondary level but, as indicated above, it is only at the 12th grade that any differentiation appears. This arrangement is open to criticism on several grounds. It is clear, from the background report by the Portuguese authorities as well as from our discussions, that this system does not provide a viable vocational or technical education. Not only are employers sceptical about its value but it is unrealistic to expect many students to be attracted by an option leading to a low level of qualification when they attain the end of secondary education. Since this option has only recently been introduced, it would be premature to judge actual participation figures as conclusive. Nevertheless, a mere one per cent participation rate amounts to virtual rejection of the option. There is a need to introduce separate provision for technical or vocational education from the beginning of the upper secondary cycle, and we therefore support the proposed reinforcement for vocational education as expressed in the proposals before the Assembly. These proposals are not very explicit, however, with regard to the objectives and characteristics of this sector. The only indication is that courses should last three years. Does this mean that a technical education course along similar lines to those offered in most European countries is envisaged? Or is the intention to develop at this level the preparation of skilled workers as an educational alternative to the courses in the centres under the IEFP and not necessarily within the schools?

If the latter, a few remarks are called for. The issue is not possible duplication of the IEFP provision. Given the present vacuum, to diversify provision would certainly be an advantage to the extent that it is clearly designed to facilitate individual choices. In addition, each of these courses could have specific features in terms of profile, clientele and content. The issue is rather one of unnecessary length and rigidity. We would expect that the average duration, as in nearly all other countries, would be around two years. Three years might be justified in a limited number of exceptional cases; it might then be argued that the course should lead to a different qualification and title. In some countries, there exist shorter courses in specialisations that do not require the same general and theoretical basis. It has to be said, however, that such countries, for example Sweden, have already instituted *common* courses at the lower secondary level.

When deciding whether these upper secondary courses should be technical or vocational – to refer to the usual European terminology – it is necessary to look at the aspirations and motivations of young people, the most precious resource on which an educational policy can be built. A recent authoritative survey shows that students' perceptions of their future prospects in the labour market are remarkably realistic. Thus, "The answers regarding the desired sector and occupation show a high degree of self-selection operating among young persons"[8]. Again, "young people seem to have extremely realistic expectations as to what will be their future earnings"[9]. And again, "The results indicate a high degree of realism of student expectations regarding their future economic role"[10].

On the one hand, when students reach the end of the common course – a point at which many of them tend to leave the system at present – it would certainly be a wise measure to offer them the opportunity of obtaining, within a reasonable span of time, a sound qualification for entry into the world of work. For many who at present drop out this target would certainly be worth pursuing. On the other hand, the proportion of those completing the common course, who are the potential clients for these courses, is still relatively small. These young people may have higher ambitions than becoming qualified as skilled workers. Answering such questions is extremely difficult given the variety of situations in Portugal. Participation in lower secondary education is already a reality for young people from more privileged backgrounds who expect to find patterns of provision in upper secondary education similar to those in more educationally advanced countries. Other young people, however – the great majority for the time being – may judge courses worth pursuing even if they do not lead to higher rewards than a skilled worker qualification.

Choice would also be affected by the progress achieved in developing opportunities for vocational education and training at lower secondary level, either within or outside the education system. Proposals under discussion indicate that for the development of vocational upper secondary courses, the cooperation of other agencies and departments will be sought, with the sensible objective of consolidating available resources. There would be no point in opposing, or discussing the respective objectives of, courses that in reality are much the same, provided that access to them is not rigidly linked to a given age or level of educational attainment. On the other hand, the proposals suggest, although not explicitly, that these upper secondary courses will be school based. If this is the objective, it might be useful to focus on types of training that require a more thorough general and technical foundation, thereby allocating the respective responsibilities according to content and type of specialisation rather than administrative or other criteria; such a distinction exists elsewhere, for example in the French system.

We heard criticisms of the fact that there exist nearly three hundred specialisations. That number is not disturbing of itself. We think, however, that an attempt should be made to regroup them in a limited number of clusters that would allow in the first year a sufficiently broad technical and scientific approach, while some of these specialisations, chosen in the light of the particular needs and possibilities of a region as well as the teaching and equipment resources available, could be used later on as pedagogical support for the acquisition of practical skills and competences and an experience of working methods and technical difficulties rather than as an orientation towards a specific field of future employment.

Whether the preference is towards vocational or technical education, we would like to stress the need for courses leading to marketable, that is, recognised qualifications. The qualifications required should be the subject of consultations and discussions with the employers' associations and trade unions. It has to be borne in mind that, in many countries, the policy and the trend are towards a pause in the expansion of higher education. As a result, an increasing number of young people who might previously have gone to university are now leaving the education system at about the end of secondary education and seeking jobs for which they have received no preparation. This situation contributes to increased competition among the more motivated or more academically gifted to gain access to higher education. At the same time, it removes or weakens the motivation of many of those who do not intend, or think they will be unable, to enter higher education. Many of them rightly judge it pointless to pursue their studies if they cannot obtain a useful training. This process may take still more time in Portugal where motivations for study seem uncertain and where the numerus clausus for entry into higher education is unlikely to be made more flexible even in the long term.

No doubt the issue of avoiding blind alleys and maintaining the possibility of continuing to study at higher levels will inevitably be raised. We believe, however, that this is a long-term problem and that the Portuguese authorities should not be unduly concerned about it at the present juncture, when the obvious priority is to build up a system of technological education virtually from scratch. In this context, the purpose of technical education is to train the middle-level technicians that the country needs rather than to create another, more expensive, route to higher education. More particularly, access to the polytechnic institutes is not a priority issue since their capacity is very limited at present and it is to be expected that priority will be given to developments at upper secondary level. In addition, to judge from developments in other countries, it may well be that occupational upgrading is not necessarily best acquired through a sequential organisation of educational levels. Access to intermediate technician posts or middle management can usefully be conceived within the framework of a recurrent education system.

Apprenticeships

There is no tradition of organised apprenticeship in Portugal, although we were informed that some employers used to recruit very young people as so-called apprentices, eventually giving them a little informal training on-the-job. Except in a few enterprises, there has been in fact nearly no structured training. It is clear that some young people are taken on illegally before they reach the legal age for starting work of 14. However, no government could officially sanction an earlier start than 14. Today, however, there appears to be a lively interest in instituting an apprenticeship system.

The main difficulty is that, so far, the recruitment of apprentices has been subject to the condition that, at the end of their apprenticeship period, young people should be offered a contract of indefinite duration. It is clear that under such circumstances, in Portugal as in many other countries, no small enterprise will take the risk of making such a commitment. The general problem of the rigidity of work legislation is at present under discussion between the government and the social partners. The point was made to us, however, that this legislation could be revised, at least with regard to the particular case of apprentices, in order to provide for more flexible arrangements. In fact, the draft law on apprenticeship currently under consideration provides for such arrangements and proposes that, at the end of the apprenticeship period, both contractual parties should remain free of any further obligation.

We expect that, as in several other countries, arguments against apprenticeship will inevitably be raised in Portugal. The image of the existing system is calculated to provoke criticisms, apprenticeships sometimes being used as a means of exploiting cheap labour with no valuable quid pro quo in terms of training. That argument may not carry much weight in Portugal where there is an agreement on minimum youth wages, but some people may be concerned by the fact that recruitment to it is socially biased. This may be even more true than in the case of full-time formal vocational training. Apprenticeship has been used in some countries to serve the needs of the residual group of school leavers who do not follow either general education or technical streams and for whom it represents the only opportunity to acquire qualifications and escape from unskilled work. This might equally apply to Portugal, where training opportunities are scarce.

We wish to draw the attention of the Portuguese authorities to the new fact that, according to current OECD studies, apprenticeship tends less and less to represent an opportunity for the residual group. In France and Germany, apprenticeship is tending to recruit an increasing number of young people who have completed a regular general education course. In France, the proportion of students from lower general secondary is about one-third of the annual apprenticeship intake; in Germany, an equally growing proportion of upper secondary graduates enters apprenticeship (an estimated 40 000 in 1980). Apprenticeship may well continue to serve the residual group, but at the same time it is becoming a respectable alternative to more formal types of education.

This trend leads us to question one of the proposals under discussion in Portugal, which suggests that an apprenticeship should lead to a recognised qualification, i.e. that of skilled worker. In some countries it is now envisaged to replace the concept of apprenticeship, which is loaded with a number of good and less good traditions and rigidities, by that of a traineeship, which would offer an appropriate juridical framework for meeting a diversity of needs, including those of very young school leavers as well as those who drop out from upper secondary or higher education and who require some kind of transitional training period between school and actual work. Such trends might lead the Portuguese authorities to consider whether such flexibility could not be introduced in the legislation from the very outset.

There is no necessity here to demonstrate the benefit which the country, and particularly smaller enterprises, would draw from the development of an apprenticeship system. The main concern is to foresee how such a system could add to the training potential of the country and how it relates therefore to other training provision.

At present, most organised training activities, particularly those sponsored by the IEFP, are full-time. In our suggestions we have left open the full-time versus part-time issue, although it is anticipated that most programmes launched by the education authorities would favour full-time participation, even when organised in cooperation with other agencies. We were informed that there is a proposal for using the IEFP centres, particularly the new ones, for training in alternation between the workplace and a centre. No doubt this would often increase the efficiency of the training effort. But given the role played by the IEFP in the implementation of the draft law on apprenticeship, there is the risk that apprenticeship and vocational training would in fact cover the same activities to a large extent.

From our discussions and from the information we collected on this matter, we did not draw clear conclusions about the way in which training will be provided for these apprentices. On the other hand, we gained the firm impression that there exists a fund of individual and collective dynamism which is simply awaiting an appropriate framework within which to innovate training schemes. There is a case, therefore, for considering the possibility of stimulating cooperative efforts on a regional or local basis among enterprises, local authorities and other interested parties towards the creation of training centres that would provide the general and technical grounding required in any modern apprenticeship system. No doubt the trade unions, which at present seem primarily concerned about salary negotiations and political matters, should be invited to take an active part in the discussions on this development and in the implementation of programmes. The draft law provides for such a concerted effort at central or sectoral level. It is normative in character, however, and the necessity remains of prescribing the extent to which local initiatives should receive both financial and technical support from the central or regional authorities and for providing incentives to individual, or groups of, enterprises, to set up cooperative training schemes.

The need for a comprehensive strategy

The visitor to Portugal is rapidly convinced of the existence of a large pool of qualified manpower simply by observing the daily life of the country. But he is equally convinced that the potential skills and vitality of the Portuguese people are far from being tapped to their full capacity. As we have already pointed out, a major emphasis is at present being placed upon integration into the EEC, which represents a major political option for the country, but its impact on economic activities will also have a profound significance. For our part, we felt that this emphasis on European integration may induce an under-estimation of the challenge facing the country, which has to enter the competition of international markets as well as other OECD countries.

One particularly relevant feature in this context is the specific structure of emigration over the two past decades, which has been analysed in some detail in the Youth Employment Review. This gives a strategic importance to the education and training of the younger generation.

The debate on this issue must remain realistic. The present success of efforts towards renewing traditional technologies, supported by modern marketing techniques, suggests that the duality of the country will remain a basic reality for some time to come. On the other hand, investors may be deeply influenced by the availability of qualified manpower for more technologically advanced activities. This in turn raises the issue of whether vocational training should accompany economic development, as it did in some industrialised countries, where the emphasis was placed on the responsibility of employers, the unions and labour market authorities, or whether it should precede and facilitate economic development, as was the case in some other European countries, where the education authorities were also called upon to play an important role, particularly in respect of training for higher qualifications.

We emphasised earlier in this chapter the effects of the vacuum created by the suppression of the technical schools. Nevertheless, there already exist a number of schemes, experiments and pilot projects, not to speak of the amount of non-formal training provided by large and small firms. However, much of the potential training capacity is still at the initiation stage. The implementation of a few schemes has already started but many remain on paper. We also noted that potential resources are dispersed over different administrations. A key concept in a vocational education strategy would undoubtedly be that of coordination.

The IEFP has been given a prominent role which the examiners for the Youth Employment Review welcomed as a very positive development and made suggestions for expanding. It would certainly be wrong, however, to conclude that the Institute should exercise a monopoly. In fact, at the policy-making level, both the Labour and Education Departments share responsibilities. Since coordination seems to be a prerequisite, there should be no fear of duplication or competition among agencies. According to the regions, the type of training and the resources locally available, allocation of tasks and roles will certainly vary to a great extent. What is needed, and we put this forward as a second key idea, is a comprehensive framework, sufficiently clear and flexible to permit stimulation of local initiatives; comprehensive in that it should clarify the roles that the schools, the vocational training centres, apprenticeship schemes and on-the-job training can play in the pursuit of given objectives; clear, because employers, local authorities and, not least, young people themselves, can see for themselves what these objectives are; flexible, because vocational education must respond to the particular needs and resources of each region and sector.

The issue of priorities is particularly relevant when ambitious plans may be frustrated by scarce resources. Here a first dilemma is linked to the duality of the country. Much emphasis is placed at present on the development of the interior rather than on the expansion of advanced industries. Should this imply a similar priority in terms of vocational training? Considering that regional development may call for relatively modest qualifications on the part of individuals, requiring short periods of training, possibly on the job, then perhaps priority should be given to the acquisition of specialised industrial qualifications. We were told of proposals to allocate different objectives to the various kinds of IEFP centres. One element to be taken into account is certainly the probability that young people trained in the interior might emigrate to the coastal towns. In our view, priority could usefully be given to the training of highly skilled workers and possibly middle-level technicians in the industrial sectors, including data- and information-processing.

The last issue we wish to raise concerns financial resources. Our suggestions amount to a plea that vocational and technical education should be a high priority of education policy and thus of the educational budget. In the Youth Employment Review, the resources allocated to the IEFP, which are substantial, were still not considered sufficient to develop the overall capacity of the system to the required level within the reasonably near future, and the question was put whether it was desirable to impose an additional levy. This may not be the right place for such a recommendation. We were given to believe, however, that many employers would be ready to contribute, provided an appropriate framework were first designed and they were convinced of the practical value of the vocational education and training on offer. We hope that the Ministry of Education will put forward concrete proposals and demonstrate its ability to establish and maintain a vocational education programme complementing its general education provision.

V

SPECIFIC SCHOOL-LEVEL ISSUES

There are certain aspects of education policy that apply across the sectors into which schooling is conventionally divided, or fall under the joint responsibility of different administrative departments. They are, for convenience, gathered together in this chapter.

Pre-school education

The State pre-school education system was set up by the Act of 1st February 1977, an expression of the government's determination to build up a network of state "nursery schools" with their own official status and, at the same time, to define the aims of pre-school education and to create a corps of specialised nursery teachers. The creation and management of establishments catering for pre-school-age children (3-6 years old) had previously depended on private initiative in the form of institutions, associations, or cooperatives, whether denominational or non-denominational, profit-making or charitable. Some of these bodies, however, already came under the Ministry of Social Affairs.

The "nursery school" network at present comprises private and state establishments coming under the municipal authorities. Some depend on the Ministry of Social Affairs, some on the Ministry of Education. This diversity of administrative status does not seem conducive to the planned and coordinated development of the pre-school education network, which would be desirable. A national programme for setting up these schools is all the more difficult to carry out because school building and operation is a matter for the municipalities.

Educational quality is, however, uniformly and satisfactorily assured, since the objectives have been defined by the Ministry of Education, which is responsible for recruiting and training the specialised teachers.

The name "nursery schools" (at first and still incorrectly used) indicates that the task of the first establishments, situated mainly in the large towns, was child minding, without any explicit connotations. The 1977 Act had the merit of defining the basic objectives of pre-school education as being designed to forestall any subsequent problems at school and to compensate as far as possible for socio-cultural inequalities. The pedagogy used in this general educative process is based mainly on play, with a gradual initiation into arithmetic and reading to facilitate the transition to primary school.

In pre-school education, perhaps more than in any other branch, the origin and educational level of the teachers vary widely, no doubt because until 1977 no national policy for early childhood education existed. The older-established schools – and especially the private ones – still employ teachers trained on the job. Since the decision to set up within primary teacher training colleges[11] special sections for pre-school teachers, recruited at the end of the 11th year of studies and trained in three years, new establishments have been able to engage qualified staff.

Since 1977 more and more state nursery schools have been opened, whereas the private network has scarcely grown at all. Currently the pre-school-age children enrolled – just over 50 000 – are half in state and half in private schools. This rapid growth of the state sector, which supplements but does not compete with existing private schools, has made it possible to provide facilities in medium-sized urban localities, whereas private schools are situated mainly in large towns. This accounts for the fact that the state sector has more modern schools and better qualified staff.

The siting, building and equipment of new schools are designed to meet the needs of pre-school education, with classes of 20-25 children. The school we visited in Funchal (Madeira), which comes under the administration of the Ministry of Social Affairs, is typical. An increasingly consistent network of pre-school facilities will be built up as the government continues to take account of existing private schools in the context of an agreement to be concluded between the Ministry of Education and the Ministry of Social Affairs, which is responsible for these establishments.

The very substantial effort undertaken in training nursery school teachers (1 500 in the state and 990 in the private sector) is being continued, with 500 teachers currently in training. The authorities acknowledge, however, that because of the costs of training and of building it will not be possible to sustain this effort over the coming years.

While it may be considered that the government has fully realised the vital importance of pre-school education, has properly defined its aims and pedagogical methods and has provided adequate teacher training facilities, yet the present effort is unlikely to be sustained, in view of the lack of financial resources and the urgent needs in other educational sectors that must take priority. Currently only 15 per cent of children aged 5-6 and about 13 per cent of 3-5 year-olds are included. Thus it remains impossible for pre-school education to fulfil its compensatory role, since rural areas have no nursery schools at all and in the towns families still have to pay fees – albeit very modest ones – at such institutions.

Special education

Any policy for special education will involve the participation of a number of ministries – Health, Social Affairs, Education and Labour. In Portugal it is this type of education which probably best reflects both the absence of co-ordination between the activities conducted by the various administrations and the overlap of responsibilities – not to say the rivalries – of the ministries concerned. This means that the resources devoted to special education are often badly handled and incompletely used, although requirements are very far from being met.

In the past, handicapped persons were catered for only by private institutions. Then, in the 1960s, the creation at the Ministry of Social Affairs of the General Directorate for Public Assistance marked the first step towards State responsibility for the problems of detection, accommodation and reintegration. It was at this time that the first specialised public establishments and the medico-pedagogical guidance centres were opened. Finally, in 1973, the Ministry of Education also entered this field, organising special education divisions within the two General Directorates for Basic and Secondary Education and introducing the first experiments in integrated education for the handicapped.

The present administrative situation – a legacy of the past – is still confused, in spite of the creation in 1977 of a National Secretariat for Rehabilitation attached to the Prime Minister's Office. Its task is to define prevention, education and rehabilitation policy for handicapped children and adults and also to undertake co-ordination and planning. The Secretariat is assisted by a National Advisory Council comprising representatives of all the parties concerned, associations and ministries. This first attempt at co-ordination was backed up by the Act of 1979 which provides, in particular, for the creation of an Institute for Special Education responsible for defining the nature of educational action and also for implementing and funding it. But the texts implementing this Act have not been published and the Institute is still no more than a blueprint, since the proposals put forward by the Ministry of Education for its organisation and installation are still being discussed with the other ministries concerned.

There is, on the whole, little provision for the detection of handicaps, since it does not fall within the competence of the health centres in various parts of the country, to which the school medical officers are attached. Detection is the responsibility of three medico-pedagogical centres administered by the Ministry of Social Affairs. Only the Lisbon centre has specialists in all the various types of handicap; the others can handle only cases of mental handicap. In rural areas and small towns it is the general practitioner, with no particular training or speciality, who decides whether or not a child should be sent to a centre for the handicapped. This situation explains the absence of any precise statistics as to the number of young people covered by special education and the difficulty of determining the degrees of handicap involved. Thus, there is often no clear distinction between children who are mildly mentally retarded and those who are simply low achievers at school and need only pedagogical support.

It is estimated that 11-13 per cent of the handicapped children who fall within the scope of relevant legislation are currently accommodated either in specialised establishments run by private bodies or by the Ministry of Social Affairs, or are integrated into normal classes under the Ministry of Education. Up to now, attention has been concentrated on those with a visual, auditory or motor handicap, of whom respectively 36, 30 and 20 per cent attend school, whereas only 4 per cent of the estimated total of 77 000 mentally handicapped are catered for. Of these, the private associations alone accommodate 2 000 of the most severely handicapped.

The school for mildly mentally retarded children which we visited in Funchal, administered by the Regional Secretariat for Social Assistance, has 83 pupils. It is installed in new buildings, very well designed and in an attractive setting. Some of the pupils are boarders, but most are day pupils travelling each day on a school bus. The timetable is taken up largely by music, drawing, arts and crafts, physical education and sport. The children are divided into 9 classes with a staff of 7 teachers, 2 educators and 9 technicians; the school can also call on the services of a social worker and a psychologist. Although only half the teachers had received specialised training at the Higher Institute in Lisbon, staffing was considered quite satisfactory. The older children attend on-the-job training courses organised by employers, on a voluntary basis and free of charge in an attempt to integrate them into working life, since they must leave the school when they reach the age of 16 or 17. The excellent accommodation, surroundings and staffing provided here illustrate the heavy financial burden which special education entails for the ministries concerned.

It is the Ministry of Education which is mainly responsible for the policy of integrating handicapped children into traditional education. In rural areas, where no other facilities exist, mildly mentally retarded children are automatically placed in normal classes with the other children; but they receive no support apart from the help their teachers are able or willing to provide. There are, however, a few establishments which are experimenting with real integration of small numbers of pupils – especially the deaf and partially sighted; these children are taught partly in normal classes with their schoolmates, and receive extra support from specialised teachers. One experiment concerns a large group of deaf children in a Lisbon secondary school which we visited, where suitable classrooms and special equipment are provided for them. In fact, however, the impression is rather one of a school for deaf children set alongside a normal school. There is no real integration; the deaf children mix very little with the other pupils and there are practically no joint school activities. It may be noted that integration implies, on the one hand, giving the handicapped children the means of being independent and, secondly, preparing the schools receiving them to do so in the best possible conditions.

When they reach the age of 16 or 17, handicapped children are sent back to their families. Generally speaking, state schools provide fewer facilities for vocational training during schooling than the private schools run by associations, which receive subsidies for the purpose from the Ministry of Labour. The school we visited in Funchal is carrying out an interesting vocational training experiment for 15-and 16-year-olds placed in firms for periods of work experience. The Portuguese authorities are fully aware of the inadequacy of vocational training for handicapped children during their schooling and of the difficulties involved in integrating them into the world of work when they leave school. Research is being carried out in co-operation with OECD's Centre for Educational Research and Innovation (CERI) to define a policy which might palliate these shortcomings.

Teachers in traditional schools which cater for some handicapped children – mainly mildly retarded – have received no specific training to help them deal with these children. Moreover, about half the teachers teaching in specialised institutions and in schools practising integration have not been prepared for this task. Training for teachers specialising in education of the handicapped is provided by the National Institute in Lisbon. These educators are of high quality and well suited to their task, particularly since the Institute carries out research in co-operation with the city's schools for handicapped children. Training at the Institute is long and costly and is sometimes criticised for being too perfectionist in view of the current requirements.

The ministries concerned are considering a university contribution to training special education staff, on more flexible lines – shorter and probably less costly, and better able to meet the urgent demand. The role of the Lisbon National Institute should then be reviewed.

The high cost of building and running special education institutions and the need for thoroughly qualified staff for the education and training of handicapped children and young people seems to indicate that this type of education will develop slowly and with difficulty. The efforts put into it will be effective only insofar as it proves possible to define a clear education policy, including vocational training, to continue to integrate handicapped children, as far as possible, into normal schooling and to ensure co-ordinated action and task-sharing among the various ministries concerned.

Curriculum development

We noticed in the Background Report (for example in para. 103) reference to the absence of adequate co-ordination between the curricula of various subjects: first, as between the successive sectors of schooling – primary, preparatory, secondary (what is called "vertical" co-ordination); second, between all the subjects studied at a particular stage ("lateral" co-ordination).

Such complaints of single or blinkered vision among teachers, preoccupied with their own specialisations, are commonplace in most countries. Portugal suffers, however, from a lack of those structures now found necessary in most Western countries to mitigate the effects of subject- and sector-mindedness. In particular, wherever there has been active curriculum development, the sequence in which cumulative elements are taught has had to be re-sorted

– hence, there has been improvement in "vertical" co-ordination. Further, the new (and invariably greater) demand for time and resources made for every subject when it has been "developed", has so crowded the curriculum that careful thought has been given to the totality – with a consequent improvement in "lateral" co-ordination. For any such curriculum changes to be acceptable, they must be authoritative: for them to be effective, they must be accompanied by a sustained effort in the initial and in-service training of teachers, and by a programme of detailed support for the affected schools. In Portugal there has certainly been no shortage of attempts to change the curriculum but the method used has been wholly inadequate. A Working Party is established, made up chiefly of practising teachers together with a few administrators, inspectors and university specialists expert in the discipline. These Working Parties have been a part-time addition to the normal work of their members. Sometimes the group has met intensively for a few weeks; more often, meetings are held during a whole or a part of the day, say, once a week, over a period of some months (a practice, incidentally, singularly disruptive of the teachers' prime commitment to their schools). Rapid changes in government since "April 25" have been reflected in a bewildering succession of these Working Parties, each chiefly representative of the currently dominant political outlook. This sort of Working Party practice has something to recommend it as a reward to selected teachers, but as a means of serious curriculum development, it wholly lacks credibility.

We can see that there are special circumstances in Portugal which would prevent the easy adoption of the more highly publicised methods of curriculum development. Portugal being small and its resources limited, the idea of providing a wide range of competing alternatives, as in the United States or the United Kingdom, is unrealistic; moreover, so confused an approach reflects a highly devolved structure of decision-making alien to the Portuguese tradition. The other obvious method is to develop a single, well-designed and well-tested course; but that has about it too many echoes of the old "livro unico" to be attractive politically to a country that has won its way through to "pluralism". Between these extremes of curriculum development, however, there are possible compromises better suited to Portuguese needs. Indeed, we heard of various plans having been prepared in detail for a "centre" or "institute" for coherent and steady curriculum development. The essential problem of putting the plans into practice has not been lack of resources (there was, we were told, signs of strong World Bank interest at one time) but extreme political partisanship and instability. We think a renewed effort is essential. A start could be made with a very few of the least politically controversial subjects (say, mathematics, physical sciences and foreign languages). We would add that in any such institution for curriculum development a clear emphasis should be placed on the *practical implementation* of *modest changes* in *ordinary schools*. The kind of institution in which higher theoretical studies about the curriculum flourish are all very well, but the work done is usually only remotely connected with the daily needs of schools and, at this stage of clamorous educational needs, may be thought an expensive indulgence. To the establishment of more serious and practical curriculum development we would like to give strong support.

Private schooling

We saw no private schools but our schedule included sessions in which people connected with the private sector took part, whether official spokesmen, or headmasters, or parents. As in virtually all European countries, the right to education outside the state system is constitutionally protected in Portugal, but rapid changes from one government to another – some sympathetic, others antipathetic in their attitudes to the private sector – have made for insecurity. Private education is particularly extensive at the pre-school and primary stages. Often, the Church is involved, and at this level private schooling arouses little controversy.

Private preparatory and secondary schools are much more rare. At present, they seem reasonably confident about their future – if that is left simply to the functioning of demand and supply. However, three major worries were expressed to us. First, that the number of changes in the content of the curriculum (the revisions often tinctured with the politics of the government briefly in power) had reduced the effectiveness of teaching and learning by undermining continuity and devaluing experience. Second, that the system of electing the director of the school at regular intervals, and of placing the management of schools in elected administrative and pedagogic councils (see below the section on "school government"), was alien to the disciplinary traditions of the private schools and should not – as had once seemed likely – be imposed upon them. Third, that the state pension scheme for teachers is not open in Portugal, as it is in other European countries, to teachers in the private sector. This made them feel less secure, and artificially conditioned the flow of teachers between the state and the private sectors.

No doubt these are matters familiar to the Ministry, but they seem to us to be worth re-stating, since the quality of the private sector matters directly to a significant minority of pupils and parents and may be as emblematic of the acceptance in education of the plurality the Constitution proclaims.

Adult education

Portugal is legally committed to a policy of expanding education services for adults in terms of a philosophy of lifelong learning and a belief that persons of all ages have an equal right to education. In practice, though a Directorate for Adult Education has been created within the Ministry of Education and a coherent development plan has been devised, the present provision is reaching only a small percentage of the great number of adults with obvious learning needs. This is scarcely the fault of the Directorate, which appears to function effectively, or of the two thousand or so active associations in the field, sustained by hundreds of dedicated volunteers: rather it is due to a lack of resources. This is hardly surprising in view of the tremendous resource requirements of initial schooling that we have described in Chapter III. As in many other countries, Portugal could find more resources for financing a rapid expansion of adult education only by diverting resources from other parts of the education system and that is neither politically feasible nor, arguably, desirable. The essential issue is whether the present provision under the control of the education authorities could be made more effective without receipt of additional resources from public funds, and whether there is scope for improvement by stimulating the activities of non-government agencies and the use of non-public funds.

The commitment to lifelong education calls for the provision of second-chance opportunities for access to all levels of formal education. In reality, the first priority is to assist illiterate adults to obtain a basic education. The rate of adult illiteracy in Portugal is high despite the expansion of primary education since about 1960 (see Table 4) and the fact that virtually all young people will now become literate through attendance at school. The average age of illiterates is now rising, and eventually illiteracy (except for that small percentage of the population that, as in all countries, slips through the school system without becoming functionally literate) will disappear. Meanwhile, the high rate is a matter for deep concern, especially as illiteracy is correlated with where people live – on the farms and particularly in more remote areas – with working class origins, with gender – the ratio between males to females is 1 to 1.4 – and with age – 60 per cent of illiterate adults are over fifty years of age. It is not only a question of social justice but, as the authorities fully recognize, of productivity. Enabling adults to become literate, especially those who work on the land, is a pre-condition of

Table 4. **Distribution of Illiterate Persons by Age Groups**
1990 - 2000 forecasts

Age Groups	1950	1960	1970	1979	1980	1990	2000
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00
0-4	21.61	25.16	30.20	36.0	36.5	44.6	55.2
5-9	9.89	8.85	7.79	6.8	6.7	5.6	4.6
10-14	4.75	0.68	0.31	0.07	0.06	0.02	0.01
15-19	6.23	1.97	0.75	0.18	0.15	0.03	0.02
20-24	5.96	4.03	0.90	0.25	0.21	0.07	0.03
25-29	5.82	5.05	1.44	0.40	0.34	0.10	0.04
30-34	5.09	5.41	3.76	1.20	1.04	0.28	0.10
0-34	59.35	51.15	45.15	44.9	45.00	50.7	60.0
10-34	27.85	17.14	7.16	2.1	1.8	0.5	0.2
35-39	6.21	5.57	5.04	2.0	1.7	0.4	0.1
40-44	6.16	5.47	5.82	4.0	3.8	1.0	0.4
45-49	5.50	6.96	6.19	5.3	5.2	2.2	0.6
50-54	4.90	7.03	6.33	6.7	6.7	4.6	1.1
55-59	4.39	6.13	7.35	7.2	7.2	6.8	2.2
60-64	4.25	5.25	7.55	7.4	7.4	8.4	5.8
65-69	3.50	4.36	6.14	8.4	8.6	9.5	10.6
70+	5.74	8.08	10.43	14.1	14.4	16.4	19.2
35-70+	40.65	48.85	54.85	55.1	55.0	49.3	40.0

increased output and greater public participation in social and cultural as well as economic development.

A national plan for literacy and basic education, set in a ten-year time frame, was announced in 1979 and a national council for supervising its implementation has been created. According to the plan, a target of 184 000 enrolments was envisaged by 1984 and expenditure was forecast at 150 million escudos in 1980 and 377.5 million by the fourth year. As far as we could ascertain, the plan is well conceived and pragmatic in its expectations of resources. The Directorate executing it recognizes the need for a variety of approaches and for relying heavily on the initiatives of local agencies at grass-roots level. It accepts that school buildings are already so constantly in use that alternative kinds of accommodation must be found. At the same time, it utilises extensively the services of school teachers, especially from those unemployed or under-employed in the primary sector. It allows payment for teachers on the same scale as for school teachers. It designs and distributes learning material appropriate for adults, always a critical requirement, through a unit of the Adult Education Directorate. It is trying to establish small libraries in villages and community education and cultural centres for groups of villages and small towns. It prescribes broadly based literacy programmes designed to foster community regional and cultural development. It treats backward regional areas as the first priority. It is sponsoring pilot programmes and experiments with a view to identifying and disseminating over the whole country information about good practices. Finally, unlike the other education directorates, the Adult Education Directorate makes conscientious efforts to collaborate closely with other ministries concerned – notably, Agriculture, Labour, Health and Tourism.

All this is admirable and satisfies the criteria. specified above, of making effective use of scarce resources. The strategy adopted is also satisfying the second of our criteria, namely, that grass-roots agencies should be encouraged and subsidized as much as possible to provide programmes. We should stipulate, however, that the programmes should be rigorously evaluated. If they are not, successes may be grossly exaggerated both in respect of the number of adults served and the quality of the programmes. To this end we believe that it would be wise to establish, as has been proposed, a national centre or institute of adult education which, among other functions, could undertake both research and development, systematic evaluation of progress and identification of gaps in the provision as well as wasteful programmes and incompetent instructors. This centre could be backed up by the network of regional and local coordinating committees. We would also recommend that consideration be given to providing radio and television programmes for adults, building on the *telescola* experience; this might mean establishing an independent television channel.

The Adult Education Directorate is responsible for the primary level of education; responsibility for preparatory and secondary level programmes rests with the Basic Education and Secondary Education Directorates. We gained the impression, however, that provision beyond the primary level is very thin. This is, no doubt, as it should be, given the scarcity of resources. We believe, however, that the second objective of the national adult education policy – to serve the needs of young adults, especially those who leave school early while still functionally illiterate – should be pursued systematically and as a high priority. Important though the education of older adults be, it is only sensible not to allow those to lapse into illiteracy who have recently experienced at least some basic education – a lapsed illiterate is notoriously resistant to a second round of learning, though it is important to note, as emphasized by many people whom we met, that a young person who has become disaffected by the formal school may well respond better to a programme of study set in a non-formal learning context. Besides, in a country with such urgent development problems it is not unreasonable to place realism before idealism by paying particular attention to those who could well be economically active for another forty to fifty years.

In this section we have dealt mainly with the need to extend basic education to all those who are illiterate. There is also, of course, a need for extensive and systematic vocational training for adults. For the Adult Education Directorate, this implies offering adults the possibility of obtaining at least some training in basic skills, which might occur within the framework of the integrated programmes currently being launched. In the longer perspective the authorities must also begin to fulfil society's pledge to provide access to all levels of education for all those adults who seek it. We are glad to record that, though resources are now severely limited and the provision of full-scale second chance education and training facilities is still a distant prospect, Portugal has already accepted the necessity for adhering to a lifelong education policy and adopting a recurrent education strategy for its implementation. Consequently it will be well placed to deal equitably and systematically with the problems of expansion when adequate resources eventually become available.

Teacher posting

We heard repeated complaints about the administrative procedures by which teachers are allocated to their posts. Only those teachers with both the "academic" and "professional" qualifications can be given a permanent post on the permanent cadre of the school. As mentioned in the next section on teacher training, above the primary level there are a great many teachers – in most secondary schools a majority – who lack one or other or both sorts of qualification, though they may have been teaching for many years. Only the teachers in the permanent cadre have security of tenure: all the others have tenure for two years only. At the end of that period they can be displaced by anyone with full qualifications. This alone results in a great many school posts being open to change year by year. In addition, of course, there are all the usual causes for teacher movement – new posts, teacher resignations or retirements, and so on. The accumulation of vacancies and applications, we understand, is dealt with centrally, nowadays by means of a computer programme which gives weight to various individual qualifications, experiences and other considerations. This combination of centralisation and an impartial computer applied to a large-scale annual movement results inevitably in some theoretically "just" but actually inhuman effects (for example, in a teacher being moved away from a settled pattern of local and personal involvement), in numerous appeals, and in a great removal each year of teachers being assigned to different posts. Of course, there has to be some movement, some preference given to the fully qualified, some opportunity for those who have done their stint in uncomfortable postings to savour the delights of the cities: but the present degree of disruption seems to be excessive and it is widely criticised. Besides, there are other interests deserving consideration than abstract "justice" to the teachers: the restless migrations are scarcely consonant with those stable relations and that degree of commitment which are reckoned to be hallmarks of all the "caring professions", including teaching.

A major barrier to changing the present system seems to be its complexity. The first stage of the annual "general post" begins, we were told, almost a year before the actual postings take effect. At the other end of the process, it has become commonplace for a number of schools not to open on the declared date, or to open with a depleted staff. In October, and often well into November, a Minister's major preoccupation, in the face of press and parental criticism, is to get all the schools open and functioning properly. But by then the process of the next year's computerised posting has begun again. Turning the treadwheel precludes the reflection and preparation needed to establish a workable alternative. A study of the alternatives, commissioned perhaps outside the Ministry, would seem the essential and overdue preliminary to reform.

Teacher training

Some developments in teacher education and training are too recent to permit comment on their effects. For example, the academic education of primary teachers has been enhanced; the period of training has just been extended by a year. We wondered if this was chiefly a response to the demands of primary teachers for a status more equal to that of secondary teachers: certainly we could not discover what serious shortcomings existed in their present training, in relation to their effectiveness in the schools, to justify so expensive a change. However, such status concerns, transcribed into higher qualifications, are not confined to primary teachers, nor to teachers in general, nor to Portugal.

We had evidence of one tangible advantage arising from the extended period of primary teacher training. One new training college we visited – its buildings not yet complete and with elements of the curriculum still under discussion – is to cater for both primary and preparatory-level teachers, a conjuncture that would have been impossible in previous times when preparatory teachers were conceived as subject specialists of the secondary level, far removed in every respect from primary school generalists. We have already referred (in Chapter III) to the problems arising from an exaggerated view of the degree of specialist knowledge traditionally required for those who teach the preparatory grades. We therefore welcome such further evidence of a steady move towards a closer assimilation between primary and preparatory teachers, for this may facilitate the combination of primary and preparatory grades into single institutions, especially in rural areas.

Another recent and far-reaching change has been the ending of the "stage" as the means whereby teachers normally become fully "professionalised". No one will doubt the value of a young teacher being able to study "pedagogic sciences" and good practices with a selected highly-qualified master-teacher, for a year, in a school setting, and in company with other "stagiers". Alas, however ideal the system may be at its best, in Portugal there have never been anything like enough "stage" places, and the shortage has become the more extreme with the rapid growth in recent years of the teaching force, made necessary by the expansion and reform of the school system. By the time a "stage" became available, teachers were often of an age, at a salary level, and with family responsibilities which made a year's absence on training extremely awkward. To prevent the accumulation of yet more unprofessionalised teachers, the universities have been encouraged, in patterns which vary from place to place and from subject to subject, to incorporate within, or to add on, the elements necessary for pedagogic professionalisation in a subject specialism. For the future, then, the majority of secondary and preparatory teachers will be (as primary teachers have long since been) fully "professionalised" *at the start* of their teaching career.

So important a change – which we wholly support – has inevitably been accompanied by the difficulties of the transition. We heard some nostalgic insistence from those who are already fully professionalised for the retention of the "stage". It was perhaps unworthy of us to wonder whether this, in some cases or in part, reflected resistance to the widening of an entrance once so narrow as to make those within a privileged group. More serious, the fact that many newly qualified teachers are fully professionalised has made the lot of unprofessionalised teachers still more unenviable. For unprofessionalised teachers can be displaced in annual school-posting by those with completed qualifications – now by an increased number of professionalised teachers – who, to add insult to injury, happen to be younger, lucky enough to have profited from the new dispensation.

Unprofessionalised teachers-in-post have been given some protection during the last few years. They are now subject to displacement at two-yearly intervals, rather than each year. And in 1980/81 a new scheme was launched to enable them to become pedagogically professionalised while remaining in post. Under this scheme, a candidate teacher-in-post ("formando") is guided by a subject-expert in the school (a "delegado"), both being supervised by a full-time appointed specialist working with a group of schools in a region (an "orientador"). They work to an agreed plan of work, which takes some account of the experience, interests and needs of each candidate, to meet requirements set by a central Council. This Council, besides ensuring common standards throughout the regions, is also supposed to ensure that suitable learning materials are available in the pedagogical sciences. There are reckoned to be some 25 000 potential candidates for in-post professionalisation of this sort – a comment on the inadequacy of previous "stage" arrangements to meet the demand.

We understand that the new scheme limps along. There are not enough "delegados" in the schools, nor sufficient learning materials, so that the brave new training scheme often looks like the old "stage" in impoverished circumstances. The training scheme is a difficult, unprecedented undertaking of a kind which requires a degree of persistence, determination and attention to detail difficult to achieve when ministers and senior civil servants change at each of the frequent shifts in government coalitions. Whatever the present difficulties, we would like to give firm support to the basic intentions and the main structure of this recuperative plan. We are in no position to make any detailed comment upon the ideas for its more effective operation, but we would stress the importance of one element mentioned – the proposal to issue a new law or decree which establishes a progressive structure into the teacher's career. Such would open up another means of reward than immediate cash – of which there is never enough – in recognition for additional services by teachers – for example, service as a "delegado" for teacher training. Response to other recognized needs in the system might similarly be reflected through a points scheme into a faster progress by individual teachers up the steps in the career structure. Such inducement has been used for various purposes in a few OECD countries – for example, to reward those who serve in one-teacher schools in remote areas.

One other note: the plan for recuperative professionalisation involves many thousands of teachers-in-post pursuing a common course in pedagogical sciences. That would seem to offer a particularly good opportunity for the use of distance learning and broadcasting. These means of "delivery" are not included in present plans for in-post professionalisation. The reason may well be that the decision in 1980/81 to respond to the bitter complaints of unprofessionalised teachers over many years, was taken at such short notice that no time or money was left for more than a stark structure, and certainly not for anything as complex as the use of co-ordinated multi-media. Our observation is not so much a criticism of what has been done in the plan to date as a recommendation for a next step in its progress. We understand that the recently established Institute of Distance Learning has already offered some courses to support practising teachers in particular subjects (French, 12th-grade maths); we think pedagogical sciences might usefully be added to its growing repertoire. And we hope that some broadcasting – probably radio would suffice, and at "unpopular" hours – could be included.

Finally, in this brief glance at teacher training, we turn to in-service education and training of teachers (INSET). Virtually all OECD countries recognize that their provision for INSET is far less satisfactory than that for initial training. In Portugal, where so many imperatives must deafen the Ministry, it is no surprise to find that INSET makes little claim on overstretched resources. Among the purposes of the recuperative plan for professionalisation is its providing the basis for a future scheme of continuing education for teachers. This prospect for INSET increases our support for the recuperative plan. Once the accumulation of unprofessionalised teachers has been worked through, and given that most future teachers will be fully professionalised from the start, the structure designed for professionalisation – based on individual schools, with support from a regional centre and with direction and material support from a national body – would be in line with the way INSET is now seen as being best provided. When professionalisation occurs at the start, rather than during teachers' careers, INSET, to refresh their skills, becomes the more important. Critical to such future INSET will be the establishment of a regional level of support. We understand that a start was made on a proposed network of eight regional centres (Centros Regionais de Apoio Pedagogico) in 1976/77 but that the attempt was abandoned in a government change. We were interested to come across analogous regional support arrangements for schools in the Azores and in Coimbra, and they may exist elsewhere. Such regional centres would also seem a step towards that more general devolution of educational activities, from the centre to the regions, which was under active political discussion at the time of our visit.

Teacher absenteeism

So many references were made, in conversations about other issues, to absenteeism among teachers that we assume the level to be, or recently to have been, unusually high. The requirement exists that teachers, like other workers, should provide medical certificates to cover periods of absence: but obtaining these seems to present few difficulties for those determined to absent themselves. All sorts of factors predisposing to absenteeism were suggested to us: for example that many teachers, especially secondary teachers, were teachers *faute de mieux* in an economy offering too few acceptable alternatives, and saw themselves as birds of passage; that teachers, when moved from one school to another in the annual "general post", saw their postings as temporary and, having a more settled family base elsewhere, visited it as frequently as their conditions and conscience would allow; that increased feminisation in the profession meant that teachers more often than before had dependants to care for; that the elective and temporary character of the directorship of schools made for less vigorous enquiry into absenteeism by colleagues than might have been the case with a permanently appointed headteacher – and so on. It was suggested to us that some recognition of attendance in career progression might act as a positive means of encouraging the observance of norms of attendance, but such is at present only a speculative possibility. There would seem to be a case for an independent enquiry – to establish the present facts about the extent of absenteeism, to make comparative samplings with levels in previous years, and to analyse the main causes, as a basis for future remedial action. Such research may quickly establish, of course, that the extent of absenteeism is being greatly exaggerated in casual talk. That in itself would be a worthwhile finding.

School government

Following "April 25th", the managers of many workplaces were displaced by committees representative of workers. Where the pressures of economic competition apply, this "syndicalist" system has generally given way to the previous managerial style, but it continues in schools. The directors of schools are elected, by their colleagues, for a two-year renewable period. They are responsible to a "Conseil directif" and to a "Conseil pédagogique". There seems to be a considerable reluctance among teachers (not least among the better qualified academically) to stand for election to such posts of added responsibility, especially that of director. A system of nomination has therefore been built into the arrangements for electing directors. Meant as a resort when candidates are not forthcoming, it has, we understand, become the norm.

Plainly, some directors, once elected and reluctant or not, have decided that it was their duty to lead their schools with their utmost vigour: others, understandably, seem chiefly aware of the temporary nature of their elevation and of its added burdens. Generally, we found teachers supported the elective system. However, we heard some sharp criticism from parent representatives. They spoke of see-saw changes in the detailed disciplinary requirements or in the rigours of disciplinary application at each change of director. Nor, they suggested, could the director count on being in charge long enough to see necessary changes firmly established by practices and custom.

How far such grouses about discipline are properly attributed, even in part, to the system of elective school governance we do not know: there are, of course, powerful social forces at work in all countries which undermine the sort of discipline parents seem to recollect once having existed, or which they desire. The principal problems in the working of the elective system and suggestions for improvement are well set out in paragraph 78 (specifically in the context of preparatory schooling, but more generally applicable) of the Background Report. We have only one point to add: we think that the appropriate elective council in schools should include representatives of parents. The possibility of some consultation with parents is raised in the Background Report (para. 77), on certain appropriate matters, where parent representative organisations happen to exist. That does not seem to us positive enough. If the parents' role were to be constitutionally recognized, then parental organisations (which are by no means universal at present) would doubtless develop in response. It is a commonplace in many OECD countries for schools to be managed by means of a hierarchical structure dependent on publicly elected bodies – a system of democratic control so remote that actual parental involvement at a local level remains small and on sufferance. In Portugal, however, there has been an admirable determination to replace such "top-down" structures by democratisation. The first step was naturally to give a voice to those professionally involved in the day-to-day business of the school. (There is now, we were told, even some pupil representation). The next step would certainly seem to be the inclusion of parents, whose concern and ultimate responsibility for their children's proper upbringing does not end, of course, at the school gates.

VI

HIGHER EDUCATION

The diversity of Portugal was stressed at the beginning of this report – diversity or, even, duality – and this has to be taken into account in designing and implementing policy. As concerns education, the full extent of these differences was perceived, for example, in connection with the extension of compulsory schooling. But perhaps it is at higher education level that this duality is most evident.

By its very nature, higher education tends to serve and even to identify itself with the most advanced and modern fraction of Portugal. Because of this, higher education – and especially the old traditional universities – are somewhat remote from Portuguese reality. This position is probably both useful and necessary, since it enables Portugal to keep its place in the international cultural community. On the other hand, it gives higher education a special responsibility in the pursuit of economic and social progress, particularly at regional level, where the new universities should play a determinant role.

At present, there is a broad divide between higher and secondary education. The former seeks to preserve educational quality and develop research, the latter to run schools more efficiently and to set up vocational training facilities for all young Portuguese.

This divide is all the more visible because of the prestige and social status bestowed by a university degree. The University and the "Licenciado" degree exert a strong influence on secondary education, which tends to be designed in terms of preparation for university, although the number of young people actually obtaining admission remains low. Such a situation is not specific to Portugal, nor even to Southern Europe (as Dean Vedel pointed out in his report to the Council of Europe); but it has to be taken into consideration in policy analysis and planning.

A similar cleavage – or at least quite distinct differences – can be observed within the higher education sector itself. On the one hand, as we have seen, traditional and new universities do not see their role in the same way. The latter, while striving to reach a comparable standard of quality in teaching and research, focus on training specialists capable of making a useful contribution to regional development and on technical assistance activities leading to close integration into the community. The former, without disregarding regional considerations, are more oriented towards the development of scientific and technical knowledge so as to be integrated into the international community.

Another factor is the relationship between university and non-university education. Development of the latter has been the subject of a ferment of policy debate in the OECD countries, a debate of particular significance for Portugal, where the prestige and special position of the University has to be taken into consideration if short-cycle courses are to be developed as they deserve.

We have thought it advisable to discuss the respective roles of the various institutions which come under the heading of higher education in Portugal and the relationships between them, placing particular emphasis, perhaps, on the co-ordination of available resources, their relations with secondary education, and especially the question of university admissions.

We must, however, make it clear that we feel our information concerning higher education in Portugal to be incomplete and fragmentary. We believe our stay in the country gave us only a very rough idea of it (with the possible exception of the new universities, whose originality and dynamism we were able to appreciate). Nevertheless, it seemed necessary to make some comments on the sector as a whole.

Finally, we should mention that a review of science policy in Portugal is currently under way[12]. While we are fully aware that in a review of higher education, research and education cannot be dissociated, we have concentrated mainly on the education side in order to avoid duplication.

Access to higher education

Policy concerning access to higher education has recently undergone far-reaching changes. The most notable was probably the adoption, in 1976-77, of a *numerus clausus*. Previously, when a fairly liberal policy was followed, the number of entrants trebled[13]. It was considered that this expansion was too much for existing intake capacity and was harmful to educational quality. This was a policy decision, justified in the light of current educational priorities. The questions raised here relate to the admission procedure and its modification.

The twelfth year of schooling (sixth year of secondary education) was introduced to replace the previous propaedeutic year, which used television teaching and had a very low output. As a result of this change, secondary education has been extended by one year; there has been a considerable improvement in success rates at the final examination.

At present candidates for admission to higher education are classified according to the marks obtained in this final examination. The total number of places in higher education as a whole, as well as in each sector, each institution and each speciality, is fixed annually by the Ministry. The enforcement of a *numerus clausus* has thus led to the introduction of a competitive examination which determines which candidates are accepted and where they are sent. One result is that not all qualified pupils are admitted (for the year 1982-1983, out of 20 000 qualified, about 15 000 were admitted); on the other hand, institutions have no say in the selection of their annual student intake.

One matter for concern arising from this system is the fate of the qualified candidates who are not admitted. As they have received no professional training, it will probably be difficult for them to find satisfactory employment. Moreover their chances of later access to higher education and their relative position if they have to sit a further examination do not seem favourable. These are issues which will no doubt acquire greater significance when, with the increase in secondary education enrolments, the gap widens between the number of qualified candidates and the number of those admitted. In other countries, such students can turn to other forms of training that in Portugal are still practically non-existent.

We also noted the mechanical method of distributing students, notably as regards geographical distribution. Thus first-year students may be assigned a place in an institution a long way from their home, although its accommodation facilities are inadequate and the cost of studies may be substantially increased thereby. This point need not however be exaggerated. Moreover, the system may well reflect the political will to avoid too great differences in institutional enrolments, particularly in less central regions or the islands. We did, however, feel that the system should be made more flexible.

However, in the present system the major problem seemed to us to be the high drop-out rate during or at the end of the first year in the major universities. Since no data were available, we were not able to measure the exact extent of this, but some information seems to indicate that the number of drop-outs and repeaters is very high. In countries where access to higher education is through a competitive examination, the drop-out rate is very low, since selection has already taken place. In countries with free access, on the other hand, the early drop-out rate is usually fairly high. It is argued, of course, that this is the necessary social cost of such a policy. Some of the people we spoke to thought that the situation in Portugal was due to the poor quality of secondary education. However this may be, it would seem desirable for the universities to aim at adapting to their present student clientele so as to bring them up to a satisfactory academic level over a period of one or two years – especially as the annual intake represents only 7 per cent of the relevant age group. Current thinking seems to take the opposite line, i.e. that it is up to students to adapt to university education. No doubt some compromise could be found between the determination to maintain and even improve educational quality and the responsibility incumbent on the Ministry, if not on the universities, towards the young students admitted.

A change in the admission procedure is being planned. From 1983-84 onwards, it will be based on a national examination quite distinct from the end-of-secondary-studies examination. This change obviously reflects the universities' determination to maintain what they regard as the quality of university education; the old propaedeutic year obviously served the same purpose. It is no doubt justified by the impact on education of the rapid increase in the number of enrolments prior to the introduction of the *numerus clausus*, but is mainly prompted, in our view, by the universities' rather harsh judgement on the quality of secondary education.

The purpose of the reform is to ensure that candidates have attained an adequate level for following a university course and have received suitable preparation for the disciplines chosen. It is to be hoped that this development will substantially reduce the number of drop-outs and repeats. The reform does, however, raise other issues.

First, the new examination will be pitched at a level and based on criteria so that, while it is true that the quality of secondary education often leaves a great deal to be desired, many candidates will have to prepare for it by themselves. Moreover, the number of candidates accepted is likely to be much lower than at present. This is a situation reminiscent of the old propaedeutic course. The central issue seems to us to be the co-ordination of secondary and higher education rather than a simple question of admission procedure. While the reform should maintain the quality and effectiveness of university education, it is likely to aggravate the situation in second-cycle secondary education (complementary courses) which will – even more than in the past – take on the character of preparation for a competitive examination. It might be hoped that this would help to improve quality – but as things stand in Portugal, will that be possible? Should earlier selection in the educational streams leading to the universities be considered? Should more pupils be encouraged to take more vocationally-oriented courses, although these are still at the planning and experimental stage? It can be seen that the question arising at the precise level of university access is merely the indicator of a far wider and more complex problem, that of the alternatives open to students.

A further question is that of access to non-university education. We were unable to obtain any precise information on this subject as concerns either the present system or the reform which is to be introduced next year. Yet this is an absolutely crucial point. Under the present system, the students admitted to non-university courses are, by definition, excluded from the university. Access to non-university institutions is not the result of deliberate choice based on the student's inclinations or career aspirations, but of an assessment based on academic criteria. This situation seems to us particularly regrettable in view of the no doubt excessive attraction of the university in Portugal as already mentioned. It would be interesting to discuss the measures concerning this issue included or planned in the forthcoming reform, since they constitute an important component of an overall policy of higher education.

The structure of higher education provision

Until the early seventies, the history of higher education was virtually the history of the universities. In 1973, the need to diversify higher education provision was recognised and the 1973 Law indicated three new departures:

i) the creation of the "new universities", already referred to above, to serve the needs of the regions;

ii) the creation of an intermediate degree, awarded after three years by the universities *(bacharelato)*;

iii) the creation of a network of polytechnic institutes, grouping technical schools and *escolas normais superiores*, also awarding a bachelor's degree.

Implementation of this Law was deferred by the events of 1974.

In 1976, the definition of an overall policy was reconsidered. Emphasis was placed on the creation of two great sub-systems: the universities and the polytechnic institutes. The universities would no longer award a bachelor's degree. Transfer facilities, through credits or equivalents, from the polytechnic institutes to the universities would be available.

In the event, the development of a network of polytechnic institutes is still at the planning stage. The documentation that we received contains very precise information on their objectives, their field of specialisation and their geographical distribution over the country. However, we heard that only two of them, specialising in agriculture, are effectively in operation, with a fairly limited number of students. The few *escolas normais superiores* – the teacher training branches of the polytechnic institutes – that had been created were suppressed. The Portuguese authorities now attach high priority to the development of these institutes. However, we have to register that, for the time being, they are nearly non-existent on the Portuguese scene.

On the other hand, the former middle-level technical schools, recruiting at upper secondary level, were "promoted" to the status of higher education institutions (as had been the case in Spain for the escuelas técnicas de grado medio). There are two main kinds of such institutions: Higher Institutes of Engineering (Coimbra, Lisboa and Porto) which took in 8 000 students in 1974-75; Higher Institutes of Accounting and Management (Aveiro, Coimbra, Lisboa and Porto), with 4 000 students in 1974-75. It is important to note that since that date, there has been a sharp decline in enrolments: more than 40 per cent in engineering, and nearly 60 per cent in management. The intake capacity for new entrants in 1980 was 2 200. This still represents 15 per cent of the total higher education intake, as compared to a mere one per cent or so for the polytechnic institutes.

Both to meet the diversity of social demand and the needs of the labour market, there is an evident need for wide-ranging higher education provision. The debate on whether it should be organised on a unitary or binary basis and whether the binary system protects the position of the universities or is less egalitarian than the unitary system does not seem to us to be relevant in the Portuguese context. Similarly, the concept of a clearly defined two-part system should not, according to us, be given too much emphasis. What is required is realism and pragmatism.

We welcome the idea of establishing centres for the training of teachers in pre-primary and basic education (as planned for in the polytechnic institute programmes). We also welcome the idea of developing integrated centres, as at the University of Aveiro. We see no necessity, however, in the search for a clearcut higher education system, for sacrificing existing institutions that are giving satisfactory results, and replacing them by polytechnic institutes (training branch). Rather, the existing institutions, subject to necessary reforms, could serve as a base for creating new ones.

The situation of the former middle-level technical schools calls for special consideration. Despite their social, economic and numerical importance, they tend to be overlooked in the present debate on higher education. It would seem that these institutions, like their Spanish counterparts, are going through an identity crisis as revealed by the sharp decline in the number of new entrants. The result is:

i) that their promotion to a higher education status leads them to reinforce their theoretical teaching, at the expense of the practical training that gave them their unique value, thus tending to transform them into second-rate "higher technical institutes";

ii) that the aspiration of their directors and teaching staff is now to obtain the recognition of university-level status, as was the case in England with the colleges of advanced technology.

At the same time, there are those who claim they should be transformed into polytechnic institutes. We would recommend that they be helped to escape from their ambiguous role, not only with respect to the content and profiles of their courses, but also the title of the degree that they award.

Another issue concerns the attribution of the bachelor's degree. As noted above, it was first envisaged that the universities should award them; now it is proposed that they be awarded by the polytechnic institutes. There are pros and cons for both policies corresponding to systems existing in other OECD countries. But this is becoming an important issue because of *(i)* the rapid change in policy, giving universities a role that was suppressed only a few years later, *(ii)* the universities consider they are in a position to award degrees at this level, seeing that polytechnic institutes have yet to be established.

We have no particular views on whether the universities should or should not award an intermediate degree, although given the traditional character of Portuguese universities, we have some doubts about their ability to design self-contained first-degree courses that would have a practical value for employment. In any case, to judge from the experience of other countries, and the scepticism expressed to us by the Portuguese authorities, many Bachelor graduates would transfer to the university course leading to the *"licenciatura"*. However, if the universities were to command the necessary resources and equipment, it might be more realistic to let them offer bachelors' degrees rather than to create new institutions. As for the purpose it might be preferable to adopt a case-by-case policy, taking into account regional needs and existing resources.

From the diversity of statements and opinions expressed during our visit, we could draw no clear impression of an overall policy with respect to the structure of higher education provision. We were very conscious, however, of the formal and informal dominance of the universities, not only within Portuguese society at large, and in the education system in general, but particularly within higher education. Perhaps for this reason, policies for the universities, including the recently created ones, are well defined and briskly implemented. Policies towards the rest of the sector, however, are less successful. For example, the whole sector of higher engineering and management institutes does not seem to receive the attention that it deserves. The present emphasis on restoring the quality of university education is certainly justified. In our view, however, this policy objective cannot be considered in isolation. The development of a network of polytechnic institutes (or, possibly, of units within the universities having the same functions) may not in itself provide an effective response, if they do not attract motivated students, as shown by the present crisis of identity in the former middle-level schools. Finally, we think that although the creation of a binary system may look attractive, it would only lead to unnecessary complications. A pragmatic policy would prove to be more fruitful for the future development of higher education in Portugal.

NOTES AND REFERENCES

1. Cf. OECD *Economic Survey: Portugal*, Paris, 1982.
2. *Improving Youth Employment Opportunities: Policies for Ireland and Portugal*, OECD, Paris, 1984.
3. OECD, *Reviews of National Science Policy: Portugal*, forthcoming in 1984.
4. "Examens des politiques nationales d'éducation au Portugal – Rapport de base", document for general distribution, in French only, a summary of which is included as Part Three to this volume.
5. The education budget has been multiplied by 6.4 between 1960 and 1976 in constant 1963 prices.
6. "Development of Human Resources and Labour Market Policies in the Framework of Migratory Movements", OECD, Paris, 1982 (mimeo).
7. *Improving Youth Employment Opportunities: Policies for Ireland and Portugal*, OECD, Paris, 1984.
8. G. Psacharapoulos, "An Analysis of the Determinants of the Social Demand for Upper Secondary Education in Portugal", OECD, 1980, p. 12 (mimeo).
9. *Ibid*, p. 13.
10. *Ibid*, foreword.
11. Some of these training colleges which might otherwise have had to close now specialise in this form of training.
12. Under the auspices of the OECD Committee for Scientific and Technological Policy.
13. The increase was partly due to the fact that the old intermediate technical colleges were promoted to the rank of higher education institutions.

Part Two

RECORD OF THE REVIEW MEETING

Paris, 8 June 1983

I

POLICIES FOR REFORM

Question 1

What are the authorities' educational priorities for the eighties, particularly in view of Portugal's imminent accession to the European Communities?

Mr. Frausto da Silva began by saying that the discussion about the future of education in Portugal had led each of the four main political parties to put a Bill before Parliament. He observed that these texts indicated a fairly broad consensus which should be further defined and expanded. In point of fact, the objectives of the various political parties, like the aims pursued by the successive governments, were appreciably the same; the debate mainly concerned ways and means of achieving them. He personally had the feeling that this debate had often been more ideological than pragmatic and that Portugal possibly had more need of a plan than legislation.

He considered that there were three major priority areas for educational policy for the 1980s. The first concerned *vocational training*. The old system had been abolished because it reflected and consolidated social segregation. It was felt that the present system, which provided vocational counselling in 12th grade, was not very effective. Real opportunities for vocational training would therefore need to be offered at upper secondary level. The second area was *teacher training*. On the one hand, as pointed out by the examiners, nearly half of all teachers had not been properly trained, while in-service training was very expensive and would demand a substantial effort. On the other, the planned extension of compulsory schooling to nine years would necessitate a considerable increase in the number of teachers. The third priority area, finally, concerned the creation of a network of *polytechnic institutes:* given the attraction and prestige of university degrees, a new branch of post-secondary education was required to train the technicians and middle-level executives the country needed.

Mr. Pinheiro observed that these priorities had been set bearing in mind Portugal's accession to the European Economic Community and, more broadly, its opening-up to the outside world. The aim was to put the accent on quality and level of education, and the decision to restrict the number of university entries should be interpreted in that light.

Question 2

What are foreseen as the advantages of the proposed decentralisation of control and management of the education system? What measures to bring about decentralisation are currently under consideration?

The Minister explained that the advantages of a policy of decentralised educational management must necessarily be weighed in the context of the political and administrative organisation of the country as a whole. Consideration must be given here to the constitutional provisions – expressly approved by all the Portuguese political parties – concerning greater autonomy for the municipalities and the decentralisation of public administration (Article 6 of the Constitution of the Portuguese Republic). These provisions naturally had some general advantages: closer relations between government and governed, participation of local bodies in decisions on the public services, citizens' involvement in political life, direct quality control of services by users and less dependence of local on central government.

These general justifications for overhauling the entire Portuguese public administration assumed their full relevance when related to certain areas of administrative action. This was true in particular of education where, in addition to the essentially political general advantages deriving from devolution, there were specific advantages relating to the actual functioning of the system. Decentralisation of the education system was thus viewed at the same time as a strategy for reforming educational management and improving its efficiency.

By analysing this strategy it had been possible to devise two policies aimed in conjunction with one another at decentralising the education system. The first was directed at transferring responsibilities to local government; these responsibilities would thus be taken on by agencies independent of central government. The second was concerned with the creation or strengthening of agencies detached from the central services which would combine at regional level all the functions at present performed by the central authorities.

As regards the first policy, the Government had submitted a Bill (84.11, October 1981) to the Assembly of the Republic which, among other things, defined the responsibilities of the administrative regions and of the municipalities with respect to public investment and management of facilities. Under this Bill, secondary and special schools, vocational training centres, workers', student and youth hostels and holiday camps, as well as regional facilities for sports, recreation and competitive sporting events, would be the responsibility of the administrative regions. The municipal authorities would be in charge of pre-school education, basic education, CPTV (televised preparatory education), adult education, canteens, leisure facilities, school buses, day nurseries, nursery schools, public parks and sports facilities and playgrounds other than those in teaching establishments. With regard to the devolution of educational management, studies were in hand with a view to marking out educational regions and strengthening the links between existing municipal and district services. It should be noted that the governments of the autonomous regions of the Azores and Madeira already had full powers of supervision, management and control over non-university education in their respective geographical areas.

In practice, these policies were coming up against a number of difficulties. For example, the new responsibilities of the local authorities called for management skills which they only rarely had. Experience also showed that staff preferred to live in the big cities and also that more teachers would have to be recruited, which was not compatible with the present financial situation. The devolution process might therefore be much slower than hoped for. *The Minister* noted, however, that Portugal was a small country which, elsewhere, could be classed as a region and that any increase in the number of specialised institutions and agencies must be avoided. *Mr. Haldén* observed, nonetheless, that the new universities provided a good example of the spirit in which regional development and devolution might be conducted.

Question 3

The Ministry of Education has become very large and, by general agreement, unwieldy. Are there any plans to streamline its administration and to revise its functions?

The excessive growth of the Ministry of Education was very often criticised. Given the centralisation of the education system and the fact that teachers were counted with all the other civil servants it employed, this criticism was not entirely justified. However, an attempt was now being made to reduce its establishment by three different means:

- First, through a strict policy of staff containment, which, during the last three years, had prohibited any increase in the number of executive staff in the central administration and put a freeze on new recruitment and, at the same time, considerable cuts in the number of teachers seconded for current administrative duties.
- Secondly, the transfer of responsibilities to the local authorities, which would, in the short and medium term, affect pre-school, basic and secondary education, would have a significant impact on the number of staff attached to the Ministry (either for teaching or for administration).
- Lastly, the Ministry itself was being reorganised so that, apart from university education, the central level would only retain the essential managerial functions, while at the same time the number of General Directorates and autonomous services would be reduced by improving the functional distribution of their activities and transferring to other ministries duties that did not directly concern educational management. However, this reorganisation could not be arbitrarily imposed. For example, the compartmentalisation noted by *Mr. Pinet* would have to be dealt with in stages. The Minister was authorised by law to issue the relevant departmental orders as and when decisions appeared useful and advisable.

Question 4

The insufficient number of schools is particularly serious and this state of affairs is all the more disquieting since, as pointed out in the Background Report, half the present preparatory and secondary schools are inadequately supplied with technical and teaching facilities.

The Minister replied that apart from the existing financial difficulties, serious institutional constraints (responsibilities badly defined and widely scattered, schools actually built not complying with the initial plans and location) had often been major responsible factors for inefficiency and wasted resources. It had become necessary therefore to supplement educational reform with a new policy of educational building. The 1981 medium-term preparatory and secondary school building Plan provided for an average building rate of 50 new schools per year. This would cope with existing requirements during the Plan's life (10 years), i.e. it would provide for the 6 years of compulsory schooling and pave the way for extending it to 9 years.

The rate of building had gone according to schedule during the last two years. The budgetary resources which would have to be assigned to this programme suggested that its target would in fact be achieved within the time stated unless there was a deterioration in the economic situation that had an irreversible effect on the building industry.

In order to avoid various difficulties, the following were nonetheless essential:

a) a single decision-making centre for the planning of this sector;
b) optimum use, at central level, of financial and human resources by concentrating them in a single agency;
c) devolution of management of the school network;

d) in the short term, transfer of responsibility for the building and maintenance of pre-school facilities and primary and preparatory schools to the municipal authorities, and, in the medium term, delegation of the responsibility for secondary education to the future regional or intercommunal bodies (federations and associations of communes).

Question 5

Does the Ministry have any plans to strengthen its research and development capacity and its machinery for seeking advice from universities and other external services?

The *Minister* stated that the current reorganisation of the Bureau for Studies and Educational Planning (G.E.P.) and the creation of a national Pedagogical Innovation Institute would be two important factors at central level in strengthening research capacity in educational administration and planning, as well as pedagogical innovation. It was therefore considered that these were necessary conditions for educational reform. The research capacity of the new Graduate Schools of Education now being set up was also being counted on in this connection, together with that of the university Departments of Education and Teacher Training Centres, which would have to be strengthened.

With regard to co-operation with external agencies, Portugal was now taking part in the activities of all the international organisations concerned with education, and its planned accession to the EEC would enable it to benefit from the support of several Community institutions. But aid from such a variety of sources might entail some risk. A choice would therefore have to be made in due course concerning which agencies should be asked for assistance, depending on the areas in which this assistance proved most urgently needed so far as implementing the reform was concerned, not forgetting the bilateral aid which might also be obtained from the countries with which Portugal had signed cultural co-operation agreements. Among the above-mentioned agencies, the OECD deserved a special mention since it had been constantly involved in the work on educational reform in Portugal ever since the Mediterranean Regional Project.

Question 6

What instruments are currently used for monitoring the effectiveness of the education system? Will they suffice to secure the success of the new reforms or is it proposed to modify and expand them? Specifically, what role will be assigned to the inspectorate?

The *Minister* recognised that the efforts to evaluate the operation of the education system had been confined in most cases to determining dropout and repeat rates and comparing them with what was considered to be the norm. In fact, no tradition of educational research existed that could form the basis for studies with a different scope, though some isolated work had occasionally been carried out of a sporadic and uncoordinated nature. The introduction of new reforms, and particularly the overhaul of curricula, had naturally called for other evaluation techniques, defined and applied according to need by working parties or teams specially set up for that purpose. In certain cases, bilateral co-operation with countries willing to assist in these studies had been very useful. However, the Ministry was fully aware that the capacity of the research services must be strengthened in the area of evaluation techniques and would endeavour to build it up in existing or recently created educational R&D institutions.

The inspectors, for their part, had the task of appraising the functioning of the system and monitoring the legality and technical quality of educational work. They therefore had a continuing evaluation function which had a practical slant since they decided what measures should be taken to remove any distortions they came across. Because of their nature and the kind of people and institutions that were involved, these measures could take two forms:

a) direct *ad hoc* action by the inspectors themselves;
b) a proposal for broader action by the executive services.

The inspectors as a whole must convey a "picture" of the true state of the system so that ways of improving it could be put forward. This accompanying role assigned to the inspectorate could be extended in future to include a direct counselling function as and when their number increased with the recruitment of experienced teachers. The inspector/school ratio had risen over the last few months to about 1:12, which already permitted frequent contacts to be established with preparatory and secondary schools.

At the same time, a method was now being devised for analysing the efficiency of the teaching/learning process. Pupils would be subjected to a series of tests; their answers would be processed in a computer and the result reported to the schools. This would show the level achieved in each subject, thus enabling steps to be taken to adapt or improve the teaching.

Question 7

What measures are being developed to ensure optimal co-ordination between the Ministry and other ministries and governmental agencies both at the centre and at regional and district level?

The *Minister* replied that, under the present governmental structure, the Ministry of Education had made a special effort to co-ordinate with four departments. In the case of educational building and post-primary educational facilities, the Ministry of Education had endeavoured to improve co-ordination between its own planning and management and the work done by the Ministry of Housing, Public Works and Transport in the building and basic equipping of schools. The underlying objective was no doubt to transfer the responsibility for educational building to the Ministry of Education.

The Ministry of Education and the Ministry of Labour had joined forces to provide young people with vocational training and guidance in order to make the best possible use of the facilities available in schools and vocational training centres. At the same time, the range of activities in industrial firms was being extended to combine strictly vocational training objectives with broader general education aims leading to a first-cycle secondary education certificate. The answers to Questions 15 to 20 would provide more detailed information on concerted action.

Mr. Pinheiro pointed out that pre-school and special education were areas in which the Ministry of Social Affairs held wide responsibilities and had considerable means of action. In the case of pre-school education, co-ordination had been organised via appropriate machinery between the education and social welfare services. In association with the local authorities and with private and co-operative initiatives, their aim was the harmonious expansion of the network of facilities and co-ordination of norms, models and regulations. Identical measures had been taken for special education, and it was also planned shortly to open an Institute of Special Education in the Ministry of Education whose responsibilities, conferred by Act N° 66.79, would include the co-ordination of all action in this area.

Further, the Ministry of Education must co-ordinate its scientific research policy activities with those of the National Council for Scientific and Technological Research of the Ministry of Culture and Scientific Co-ordination. Ministry of Education research had developed mainly in the universities. In this area, not only did the National Institute for Scientific Research promote and co-ordinate a functional relationship between the university research centres and manufacturing industry and the provision of services to it, but these centres were also encouraged to contribute to national science and technology policy.

Lastly, co-ordination must be stepped up at regional and local levels. A linkage with the Ministry of Internal Administration was vitally important for the decentralisation of the education system and for strengthening the role of the local authorities. This co-ordination came to the fore when legislation was being drafted or joint teams were being set up to work out the timing and means of bringing about this transfer of responsibilities. At regional level, the Regional Co-ordination Commissions of the Ministry of Internal Administration had technical co-ordination offices that included representatives of the various central government departments which harmonised activities and co-ordinated the integrated regional development programmes.

While welcoming the progress made with regard to co-ordination, the *Minister* noted that the Ministry of Education was dependent on other ministries in certain of its areas of responsibility, even though education accounted for a fifth of the State budget.

II

THE SCHOOL SYSTEM

Question 8

Many primary schools in remote rural areas suffer from severe disadvantages. What are the Ministry's long-term plans for rural school development?

The Minister pointed out, first, that the problem of primary schools in rural areas had to be considered in the context of the integrated development of these regions. He added that the main responsibility for solving this problem should therefore fall to the local authorities, first at regional level and then at national level, as logically dictated by integrated planning.

As regards central administration of education in the strict sense, it would seem possible to launch various actions on behalf of schools in underprivileged rural areas. The problem of rural schools was first one of isolation, which was partly due to the fact that Portugal did not have an adequate road network. There were several possible ways of remedying this state of affairs. One of them was the one-teacher school; the country was lucky enough to have outstanding teachers, both men and women, who were dedicated to their task. It might also be possible to use school television or to organise a busing system, but these were not entirely satisfactory solutions. Another aspect of the problem was whether certain of these schools ought to be kept going. In some areas of high emigration abroad or to the cities and coastal areas, the number of pupils was becoming very small and some schools were reduced to a mere two or three. Of the various possible forms of action, three were now felt to be urgent:

a) qualified teachers must be attracted and retained by offering better living and working conditions, i.e. higher salaries and better housing;
b) support activities in the field must be strengthened;
c) institutional machinery must be created to link schools with other neighbouring schools in order to put an end to their isolation and facilitate a normal school career.

In the future, tightening these institutional links might lead to new forms of schooling in any new grouping which proved useful or necessary.

Question 9

The preparatory school was first established at a particular epoch to meet a particular need. Is it still considered an essential bridge in the basic schooling cycle given the commitment to extend the compulsory period by three years? Would it not be preferable to organise the cycle either in 4 + 5-year or 6 + 3-year stages?

The position of the preparatory schools must obviously be looked at in the context of their future development, in other words in the context of the general consensus on extending compulsory schooling to 9 years. These nine years could of course be split up in different ways:

- *a)* 4 + 2 + 3
- *b)* 4 + 5
- *c)* 6 + 3

And while the final solution would certainly have to be enacted by Parliament – since the present legislation would have to be replaced – its implementation would unquestionably be heavily conditioned by the circumstances, i.e. by what buildings, facilities and human resources were available. These would not be the same throughout the country.

The solution would of course have to be based on educational criteria in keeping with the aims of compulsory schooling, for which curricula and teaching methods would have to be worked out. In this connection, *the Minister* agreed with the examiners that the final structure should be a 6-year cycle followed by a 3-year cycle. He thought that it was premature to put children leaving primary school, where they had had only one teacher, into the hands of teachers with separate subject areas; he noted, however, that the unions held the opposite view. *The Delegate for Switzerland* observed that the use of specialist teachers implied schools of a certain size and that rural areas would therefore be at a disadvantage.

The Minister pointed out, however, that the starting position differed considerably from one region to another, which indicated that it would be possible to find different solutions geared to changes in these positions without sacrificing the objectives of education. The important thing was to match each position with the solution most appropriate for the pursuit of common objectives.

Question 10

How do the authorities view the future of telescola? *Do they have any immediate plans for modifying its functions?*

School television was one of the teaching methods used in the preparatory cycle (5th and 6th grades). Although regarded as less satisfactory than direct teaching, it was felt that it was the only possible solution for isolated villages whose population size did not justify opening a school providing direct teaching. Various reasons connected with the national economic situation or local circumstances had led to its use in somewhat different conditions, so that CPTV had become a fairly important teaching system which had, incidentally, produced excellent results.

Lately, the CPTV method used in the 5th and 6th grades had on several occasions been in danger of discontinuation. But it had not been discontinued and it would not be possible to do so in the near future for two main reasons:

- *a)* it could not be replaced by direct teaching;
- *b)* it was difficult to obtain the agreement of the local authorities, even in cases where, although the alternative of direct teaching existed, school buses would have to be organised, albeit for short distances.

It was nevertheless considered that CPTV might one day be discontinued as a vehicle for school education. It was therefore important to start thinking about converting its functions or, if preferred, assigning a new function to its support services; a proposal had recently been made along these lines for the creation of a school television channel to be run by the Ministry of Education itself.

Question 11

Like many OECD Member countries, Portugal now intends to offer nine years of common schooling to all children. What are the specific aims of the seventh to ninth years? Why is this cycle being made compulsory?

The Minister pointed out that, generally speaking, the aims of this three-year cycle were probably not very different from those which might be set, for example, for the preparatory cycle. Thus, the 7th, 8th and 9th grades endeavoured to develop:

a) the scientific, cultural and social education of the young, putting the emphasis on their involvement in the life of the community;

b) the basic knowledge to help them improve their understanding of the world they lived in and subsequently go on to further study in the fields they found most interesting.

It was therefore felt that a young person leaving 9th grade had better chances of personal fulfilment in his role in society, his later choices, or even in entering working life.

It must be remembered that in the past the level of education of the Portuguese was not uniform and was often very low, especially in rural areas. The initial conditions due to the environment and family background therefore put young people in these regions at a disadvantage compared with those who lived nearer the big cities or came from a higher socio-cultural class. Longer school attendance was therefore a measure of social justice whose aim was to reduce basic inequality, in other words to provide more equal opportunities. Indeed, considering the educational level of many regions, the mechanisms that provided an incentive for longer participation in school or non-school education could be expected to produce the desired effects in the very short term.

The intention in extending compulsory schooling to 9th grade was to prevent young people from entering working life too soon and to rescue them from the possible disadvantages of an uninspiring environment. At the same time, it was felt that this extension was definitely a State responsibility. This meant that, when the legislation extending compulsory schooling to 9th grade had been adopted, the State would implicitly be under an obligation to find the human, financial and material resources required to implement it. The compulsory character of this three-year cycle was therefore more than justified, although the rise in voluntary participation had been responsible for around 67 per cent enrolment in unified education, which was a significant increase on the early 1970s.

Question 12

It seems inevitable that during the next five to ten years many young people in first-cycle secondary school will take a gloomy view of their future prospects in the labour market. How is it proposed to motivate such young people to profit from the sixth to ninth years of schooling? Will there be significant modifications in the curriculum and in teaching methods?

The *Minister* stated that the present aims of unified secondary education had been discussed both in Portugal and at international level, as for example at the meeting of European Ministers in Dublin. It was recognised, furthermore, that the best way of matching curricula and teaching methods and practices at this level of education to the targets assigned to it had not yet been found. This was particularly true of the relationship between secondary education and working life. Special attention must therefore be paid in future to briefing pupils about careers after unified education and to the necessity of interesting them in practical activities. The secondary schools must become educational centres in the broad sense and link up better local activities, arts and crafts, and various trades. In the present economic crisis, one of the main objectives of general secondary education must, however, remain to prepare young people for change so that they could cope with unexpected developments and be able to update their skills through continuing training and education. In this connection, the Background Report often mentioned the dissatisfaction caused by the present situation and the vast area for action open to the policy-makers. But the task was a long and difficult one because the many educational reforms introduced since 1970 had in the end given rise to mistrust and disappointment. Any reform must at all costs, therefore, be carefully thought out and discussed if it were going to be successful.

The areas in which short-term improvements could probably be made included:

a) horizontal and vertical harmonization of curricula;
b) development of educational and vocational briefing and counselling;
c) a stronger occupational component, which ought to be linked with the school Leisure Centres (CTL);
d) greater use of audio-visual support media, especially television.

Activities which might stimulate the pupil's interest in school life, apart from improved school conditions, might include:

e) the development of CTL;
f) more school sports;
g) closer ties between school and community, i.e. parents' associations, local authorities and other components of life in society.

Turning to the last part of the question, the *Minister* said that no substantial short-term change was planned in curricula, nor in teaching methods for the 7th to 9th grades. In the medium term, when a school television channel became available, it might be possible to consider modifying teaching methods and content since there would obviously be a larger support structure by then.

Question 13

The present provision for counselling and guidance in the first-and second-cycle secondary schools is meagre. Given the planned extension of compulsory schooling by three years, the secondary school curriculum changes being introduced and the intention to offer vocational and technical courses in the upper secondary cycle, it is inevitable that many pupils and parents will experience great difficulty in making appropriate curricular and career choices. What policies are envisaged for creating an adequate counselling service in the secondary schools?

Mr. Pinheiro replied that the Background Report had endeavoured to highlight the factors responsible for extending the coverage of vocational guidance in response to the ever-increasing demands of pupils, families, schools and the labour market. The Ministry of Education's educational and vocational counselling policy had two fundamental objectives: to reduce the number of educational failures and to give effective support for continued study or entry into working life. In order to achieve these two ends, it would be essential to work out a medium-term plan which, in co-operation with other departments and especially the Ministries of Labour and Social Affairs, would realistically define:

- decentralised briefing and education/training structures;
- ways of making optimum use of the human resources available at the different levels and in the different departments and gradually improving the training of the necessary staff;
- the rationalisation of the existing information media and facilities for effective contact with pupils and parents, giving priority to the 9th grade and the complementary course;
- a stronger briefing system than that already operating in secondary schools, albeit in a rudimentary way, by setting up educational teams, possibly in the form of pilot experiments in underprivileged regions.

The *Minister* said that a training institute existed for counsellors whose graduates were of excellent calibre but were still too few in number. He hoped that co-operation with other ministries would enable the counselling services to be adequately enlarged before the reform of the upper secondary cycle began.

Question 14

The day-to-day control of schools is in the hands of elected committees rather than the traditional "principal". Has this system of control been found to be effective? Are there any plans to involve parents and community leaders in the running of the schools?

The *Minister* stated that the present management model of preparatory and secondary schools was regarded within the education system as one of the most vigorous expressions of their democratisation after the revolution of 25th April. No systematic evaluation had been made of what constituted democratic management either now or in the past.

However, it would seem possible to consider certain often expressed opinions, including the one contained in the question: would this management model be less efficient than the preceding model based on the authority of the "rector" or "principal"? The management model based on the democratically legitimate management boards elected by direct internal suffrage had apparently not been as efficient as might have been desired. There were probably several reasons for this, including:

a) the lack of clarity of the definition of the schools' administrative and pedagogical autonomy and the forms that this ought to take;
b) teachers' lack of training to deal with administrative problems;
c) the short duration of the mandate of the management boards (2 years);
d) the instability of schools' teaching staffs;
e) lack of support from the Ministry and working conditions that did not allow effective involvement;
f) the divide between school management bodies and local communities.

No study definitely confirmed the inefficiency of this model, but it was felt that a future structural reorganisation ought to be based on the following policies:

- preserving the essentially participatory character of school management;
- guaranteed continuity of the management bodies, whose terms of office would be lengthened;
- involvement of local government and parents' association representatives;
- creation of the profession of school administrator.

According to the Constitution of the Republic (Article 67), the State was responsible for protecting the family by co-operating with parents in the education of their children and by defining a comprehensive integrated policy for families after consulting their representative associations. This precept had found its first application in Act No. 7.77 of 1st February, which laid down that the creation and general activity of parents' associations and their federal structures must comply with the general rules on associations, but subject to simpler legal formalities. The same Act recognised the right of parents' associations and education authorities to voice an opinion on the management of schools and the general direction given to education and youth policy. Their opinion was required on Bills relating to preparatory and secondary education.

Order No. 122/79 of 22nd May regulated the operation of and action by the parents' associations, especially their periodic meetings with the management boards and other school bodies. The same Order also defined the terms of the involvement of parents' associations and education authorities in the management of schools, entitling them to voice an opinion on internal regulation and to take part in the teaching boards' annual meetings.

III

VOCATIONAL AND TECHNICAL EDUCATION

Question 15

The whole field of vocational and technical education and training is underdeveloped. Yet in view of the imminent accession of Portugal to the European Communities, it represents a high priority. How do the Portuguese authorities react to the examiners' proposal that a national commission be appointed to assess needs, identify priorities and allocate responsibilities in this field?

Mr. Pinheiro replied that educational policy was always more or less geared to the outlook on the labour market. However, whereas the objectives or effects of an educational policy had a horizon of several decades, the labour market underwent rapid sectoral changes and its horizon varied from one to five years depending on how it was analysed.

It was very difficult to quantify the labour market's specific needs in 10 or 20 years' time since they depended on economic policies, the short-term economic situation, scientific and technological progress, commodity trends, etc. Who would have been able 20 years ago to predict the present development of computing and data transmission? How fast would biotechnology develop? And so on. In view of this and the fact that science and technology (even in traditional fields) evolved so quickly, the educational planners merely had to provide a sufficiently broad education and endeavour at the same time to add extra flexibility via continuing training to facilitate retraining, advanced training, specialisation, etc.

Recent surveys in Portugal indicated for the end of the century that:

- the existing universities would be able to meet most of the requirement for university graduates;
- there would be a substantial need for non-university technicians.

Similar conclusions were reached in the recent report by the Portuguese Industrial Association (AIP) and by the review of employment and vocational training policy in Portugal.

Given this state of affairs, it was intended:

- to retain the present "numerus clausus" in the universities;
- to continue the work of setting up a network of polytechnic institutes;
- to review and strengthen the technical/occupational component of secondary education (10th to 12th grades);
- to promote the creation of Leisure Centres (CTL) linked with the local economy and culture.

In addition to middle-level technicians and skilled workers for industry and agriculture, whose training was shared with the Ministry of Labour and several medium-sized and large firms, the following industries were to be given priority:

- Engineering
- Electronics
- Building
- Data processing
- Agriculture
- Education
- Paramedical and nursing education
- Fisheries

either at intermediate or at higher level (polytechnic). It could therefore be concluded that the conditions now existed for implementing a technical and vocational education policy capable of meeting present and future needs.

It might prove useful to set up a commission, but it was thought that, since interministerial commissions had not always proved satisfactory in Portugal, the Commission in question ought to be essentially technical and in any event placed under the authority of the Ministry of Education with the active participation of the GEP and include motivated outside members equipped with an adequate technical training and possibly recruited in the universities, even if only required part-time.

However, if the initiative had to come from the Government, it might be more worthwhile to discuss matters with the regional commissions. Three experiments had therefore been launched in the agricultural sector from which it was hoped to arrive at a framework for action.

Question 16

The abolition of the vocational and technical schools has left a critical gap in the nation's provision for vocational training. What are the authorities' views on the examiners' suggestion that, at least in the medium term, vocational provision should be available in the first secondary cycle on a substantial scale? Could such provision be treated, for a transitional period, as the equivalent of compulsory school completion?

Mr. Pinheiro observed that the provision of vocational training in 7th, 8th and 9th grades raised educational and policy objections. Moreover, there was the question of whether this provision ought to be formal or informal.

The problem of educational and vocational briefing and counselling was just as important as or still more important than the question of vocational training from the age of 12. It had indeed been observed in many cases that educational and vocational choices had little connection with the abilities and qualifications required, owing among other things to an ignorance of occupations and the shortcomings of the counselling machinery. Manual work had become devalued and was less and less attractive to young people and this was continuing to put them off certain trades, although the wage differential with the so-called white-collar occupations had narrowed.

The unified cycle (from 7th to 9th grades) included workshop practice, while the 9th grade provided pre-vocational training. This development, side by side with the creation of Leisure Centres (CTL), should arouse interest in practical work.

Mention must also be made of the combined efforts of the Ministry of Education and the Ministry of Labour to provide vocational training for young people aged 14, 15 and 16 who would normally have dropped out of the education system. The present activities had been launched in association with industry and with the backing of the employers' associations; this had proved a rewarding experience. Young people taking part in the programme would obtain not only a trade certificate and virtually the guarantee of a job, but a 9th grade education certificate as well.

It was hoped that the future Apprenticeship Act would make it possible to expand this form of vocational training, which came under the Ministry of Labour but was broadly supported by the Ministry of Education.

Question 17

At the upper secondary level, there are plans to develop separate branches with a vocational orientation and, indeed, some experimental programmes have been started. However, the objectives of these proposals remain imprecise. Is the intention to establish vocational programmes leading to a skilled worker qualification (in fields that require a stronger basis than those to be taught in the first secondary cycle) or to a more scientifically-based education leading to a qualification as a technician?

Mr. Pinheiro explained that vocational training was not the sole responsibility of the Ministry of Education and it was felt that it ought not to be essentially concerned with training semi-skilled workers, i.e. for mainly manual or repetitive work. The main responsibility in this area ought really to devolve on the Ministry of Labour and private firms.

It was the Ministry of Education, at least during the present economic situation, that should be responsible for training middle-level and higher technicians, for whom a scientific or technical education was already quite important. This did not mean, and it was not the case at present, that the Ministry of Labour or other departments were prevented from taking part in Ministry of Education activities – quite the reverse – or that the Ministry of Education did not recognise the equivalence of qualifications obtained through the Ministry of Labour by those wishing to continue their studies.

The proposed reorganisation of the supplementary secondary cycle (10th-12th grades) included the diversification of curricula and greater autonomy for schools and regional structures in working out the occupational component of curricula and in obtaining the necessary human and material resources. Indeed, it was recognised that, in the short and medium term and assuming that it wished to do so, the Ministry of Education would have neither the financial means nor the planning capacity for central management (as was the case at present) of this type of structure. In this respect, for the reorganisation to be successful, the Ministry of Education would have to define the norms for this complementary cycle and draw up the necessary protocols and agreements with local authorities, firms, ministries, etc., which would have to collaborate in future with the schools to start up technical and vocational training.

It was felt, both for the definition of norms and for obtaining resources, that the Ministry of Education would have to co-operate with the Ministry of Labour through the Secretariat of State for Employment (SEE) and the Vocational Training and Employment Institute (IFPE), with the Ministry of Agriculture, Trade and Fisheries (MACP), and also with the Ministry of Internal Administration (MAI) through the Secretariat of State for Regional and Local Administration (SEARM) and the Regional Co-ordination Commissions (CCR).

It was considered that the main features of the reorganisation would be:

- more emphasis on the vocational component and, within that component, experiment and workshop practice (increasing it from 30 to 60-70 per cent);
- equal opportunities of access to every type of post-secondary study;
- more educational and vocational briefing and counselling, using a variety of channels, jointly with other departments or institutions.

This reorganisation therefore presupposed close co-operation between the Ministry of Education and the Ministry of Labour, the Ministry of Internal Administration and the Ministry of Agriculture, Trade and Fisheries and was based on greater autonomy for regional and local structures and on co-operation between school and community.

Because of the shortage of facilities and teachers for most vocational courses, initially the courses would have to be in subject areas where both were available, i.e. in about a hundred schools: the former technical schools, those that had a vocational training section and those that were near vocational training centres (CFP) or farms, etc., run by the Ministry of Agriculture, Trade and Fisheries (MACP). Teachers, for their part, would have to be recruited among those members of the technical staffs of the Ministry of Labour, the Ministry of Agriculture, Trade and Fisheries and local firms who could spare a few hours a week to teach occupational subjects.

On leaving the new complementary cycle, the student ought to have the qualifications equipping him for easier entry into the world of work; these qualifications would be based on a general and scientific education paving the way for continuing training.

It would be desirable for the Ministry of Labour to recognise the "potential occupational skills" of the young people completing this cycle. Hence the fundamental importance of co-ordination between the Ministries of Education and Labour when defining norms and authorising the vocational courses proposed at local level.

It was hoped to try out the first activities of this kind in four or five agricultural schools in 1983/84 in close co-operation with the Ministry of Agriculture, Trade and Fisheries (MACP), while technical training was due to begin in 1984/85 since its wide range called for certain additional precautions.

Question 18

Do the authorities envisage the expansion of apprenticeship training through co-operation among employers, trade unions and training authorities? By what means do they envisage providing the training component mentioned in the Apprenticeship Bill?

Mr. Pinheiro stated that full-fledged training programmes were already being run by the Ministry of Education, the Ministry of Labour and private firms through the Training Control Commission (CCF) and the Permanent Education-Labour-Employment Linking Scheme (SAPETE). In this type of in-service training, general education was the responsibility of the Ministry of Education and practical technology was shared between the Ministry of Education and the firm, while the initial investment (infrastructure) and administration were handled by the Ministry of Labour. The "headquarters" of the Training Control Commission (CCF) was located in premises lent by a private firm. This triangular setup was intended for young people aged 14 to 18 (6th grade) and was operating very satisfactorily. It was intended to extend it to other medium-sized or large firms. Other methods would have to be used for small firms; in other words training would have to be organised in Ministry of Labour Vocational Training Centres (CFP) or in the Ministry's annexes, provided they were equipped with adequate material facilities (workshops, laboratories).

The development of this type of action therefore depended first on the existence of the necessary facilities; this was why it would be possible in the medium term to extend it to schools such as:

- those equipped with vocational training facilities (BIRD);
- the former technical schools;

- schools near the Vocational Training Centres of the Vocational Training and Employment Institute (Ministry of Labour).

At the same time, the Ministry of Education did not have sufficient human resources with the necessary technical qualifications to teach practical technical subjects. Part-time teachers with the technical qualifications for this type of teaching would therefore have to be recruited.

At the present time, one of the obstacles to developing this type of training was that firms taking on apprentices were required to offer them permanent contracts. This obligation would apparently be abolished by the forthcoming Apprenticeship Act.

The spirit in which the Ministry of Education was tackling this problem was evident from the reply to Question 17. However, it had to be stated that apprenticeship and apprenticeship policy must primarily be the responsibility of the Ministry of Labour, and the Ministry of Education could only hinge its own action on the Ministry of Labour's and co-operate with it, as was in fact the case. For the moment, it was felt that the Ministry of Labour must base its activities essentially on the pressure of employment and the demand for labour, and concentrate on:

- initial training, i.e. transforming the unskilled worker into a skilled worker;
- retraining.

The aims of the Ministry of Education, for its part, were:

- a more sectoral and less specific initial vocational training of a higher scientific, technical and cultural level;
- advanced technical training for middle-level and higher technicians.

Middle-level technicians were trained at 12th grade level and higher technicians at polytechnic institute level, the intended distribution of the total number of students leaving 12th grade being as follows:

University	35%	University graduate
Polytechnic institute	30%	Higher technician
Working life	30%	Middle-level technician
Others	5%	

Question 19

Vocational training is geared to several levels of qualifications customarily corresponding to different levels within the education system. What criteria are being applied to determine which level or levels should be accorded priority, and what machinery is being used for allocating the responsibilities as between the Ministry of Education and other governmental and non-governmental agencies?

Mr. Pinheiro recognized that, owing to Portugal's shortage of financial, human and material resources, any vocational training programme must necessarily involve co-ordination between the Ministries of Education and Labour (at least) in order to make the most of the human and material resources available and avoid duplication of efforts.

Two types of action were planned in this connection:

- action within the education system, run mainly by the Ministry of Education or its dependent schools but, especially in the complementary secondary cycle, involving active co-operation with the Ministry of Labour (Vocational Training and Employment Institute), the Ministry of Internal Administration (Regional Co-ordination

Commissions), local authorities and private firms (notably through the Portuguese Industrial Association);

- extra-mural action, which would not be run mainly by the Ministry of Education but to which it could (and must) contribute, by trying to ensure wherever possible that the extra-mural training was equivalent to that within the education system.

In view of the characteristics of Portuguese society, care must be taken to ensure that both forms of training were open-ended, i.e. to ensure that trainees could continue their studies if desirable. This implied *effectively* upgrading the system considered and eliminating any obstacles to young people's entry into such systems.

The following training levels were planned:

LEVEL A: 6th grade + 2 years' apprenticeship

LEVEL B: 9th grade + 2 years' vocational training, or
LEVEL A + 1 supplementary year
+ 1 vocational training year

[11th grade + in-service training might also be acceptable. The entrance examination for higher education would be open to candidates who had completed 12th grade or the supplementary year after LEVEL B: in other words, LEVEL C candidates (even with no in-service training)].

LEVEL C: 12th grade + in-service training, or
LEVEL B + 1 supplementary year
+ in-service training

LEVEL D: Polytechnic institute (2 to 3 years)

LEVEL E: University (4 to 6 years).

This showed the great importance of co-operation between the Ministries of Education and Labour both for the use of resources and infrastructure and for the definition of plans and curricula. Co-operation was also important in the area of instructor training and obtaining assistance from the universities.

It was felt in the Ministry of Education that the institutionalisation of contacts between the Education and Labour departments, although taking place at a level close to Ministers, must be based on permanent non-political structures which ensured continuity of action. The Ministry of Education did not foresee any major difficulty in co-operating with the Ministry of Labour. On the contrary, it believed that all the conditions existed for greater and closer collaboration.

Question 20

Vocational training needs are often best identified and catered for at local or regional level. The examiners were struck by some interesting local initiatives and heard of several ideas that would be worth implementing, given adequate support. The main barriers appear to be the lack of co-ordination of existing resources and organising skills. What measures are under consideration for stimulating local and regional initiatives within the context of the general trend towards decentralisation?

The *Minister* said that decentralisation was still in its early stages, which meant that there were as yet serious gaps in the relevant legislation, particularly with regard to the institutional involvement of local authorities and inter-communal groups. Indeed, in spite of the approval in 1979 of the Local Finance Act transferring the responsibility for school building and maintenance in the compulsory sector to the local authority, this compromise had only really been adhered to in the case of primary schools for want of financial resources. In other areas where devolution and regionalisation were awaited, so far intentions only had been expressed. At general planning level, however, the Regional Co-ordination Commissions had an important part to play and performed it fully and actively as regional intermediaries but nonetheless without direct executive responsibility.

The Ministry of Education had focused on contacts with the Regional Co-ordination Commissions, but it had not neglected to present its proposals and projects to other bodies, especially local authorities, local representatives, private firms, etc. At the same time, local school-based initiatives had been encouraged or supported experimentally, and this had involved co-ordinating local interests relating to agricultural education (3 pilot experiments), the Leisure Centres (CTL), school-community link-up, and so on.

Besides the Regional Co-ordination Commissions (CCR), a larger role would have to be given to local authorities. These last had so far mainly concentrated on the basic urban infrastructures, but they hoped to play a greater part in education in the near future and to help develop local initiatives either in technical and vocational training or in school management, as also in adult education. It was felt that the normative framework of these relations ought first to be examined and draft outline agreements prepared as the pilot experiments evolved. Realistically, the introduction of technical and vocational training in about 100 schools could not take place before 1986/87 if its quality were to be guaranteed.

IV

SPECIFIC SCHOOL ISSUES

Question 21

The authorities are committed in principle to the rapid development of pre-school provision. In view of the resource constraint, what are the priorities in this sector?

Mr. Emidio said that the expansion of pre-school education would have to be carefully planned so as to avoid the disadvantages of "spontaneous" growth observed hitherto. Its development must allow for the relative shortage of resources and the present social and economic situation, and it must be designed as part of the general strategy of developing the entire education system which would be an important feature of the reform. Traditionally, nursery schools had either belonged to private organisations or had been run by the Ministry of Social Affairs. Recently, there had been a strong tendency for most schools in the public network to come under the wing of the Ministry of Education; this tendency seemed irreversible and was even considered desirable. However, it had added still further to the burden of the Ministry of Education, which already employed a third of all civil servants and was allocated nearly a fifth of the State budget. It was therefore thought that in future (in compliance with the present devolution plans) the communes would have to be responsible for opening and managing state nursery schools, while central government would be responsible for encouraging and subsidising them in towns whose population size warranted such schools but which could not afford to pay for them in full.

The normative functions of supervision, general planning and teacher training would nevertheless have to be the prerogative of the Ministry of Education. Regional priorities would have to be set to allow for areas deprived of welfare facilities and those with a high proportion of working women.

The State would also have to give priority to nursery school teacher training since there were plainly not enough teachers. Local authorities would have to make a special effort, according to their means, for the educational network in their sector. In this connection, the definition of standards for building, facilities and space distribution, together with the launching of pilot projects, were areas where state action had become necessary and urgent.

Question 22

Portugal is committed to integrating handicapped children in ordinary schools. What problems could bringing about that integration entail and how is it proposed to overcome them?

The Minister stated that special education was still far from adequate owing to a number of factors combined, just as in other areas of educational activity, where various bodies had central power over the definition of policy, planning or the management of facilities and resources. It had naturally been difficult to co-ordinate efforts in order to implement a unified, jointly defined and decentralised policy.

Much progress had been made, however, and the Ministry had in general endeavoured to apply the Special Education Act (Act No. 66.79) adopted by the Assembly of the Republic and, in particular, to establish the conditions for improving the integration of handicapped children, especially those with a physical handicap. With this in mind, the Ministry was paying special attention within its specific sphere to:

- training skilled staff and defining their professional status;
- providing greater support for integration by stepping up the action of the itinerant teams and raising the educational welfare allowances;
- reviewing the school network and adapting schools to receive handicapped children;
- adjusting curricula and evaluation methods.

But the Ministry was aware that introducing a special education policy, which was already complicated by the necessity to co-ordinate the action of different ministerial departments, would be hampered by inadequate financial resources.

The examiners, together with *the Delegate for Denmark*, felt that it was indeed most advisable that the Ministry of Education should have the main responsibility in this area. This arrangement was good for the integration of handicapped children and facilitated their transfer. Like the *Minister*, they considered that it was neither possible nor sufficient to entrust the education of handicapped children solely to specialist teachers and felt that all teachers must be given extra training.

Question 23

What importance do the authorities attach to the role of private schools? Is there any intention to modify public policy towards them in the foreseeable future?

The *Minister* affirmed that Portuguese law unequivocally recognised the principle of freedom of education, as well as parents' right to choose the kind of education they wanted for their children. One intrinsic consequence of this principle was the State's responsibility for facilitating private and co-operative education, which was governed by its own statute.

According to the terms of the Statute on Private and Co-operative Education, which was a concrete expression of the doctrine established by Act No. 9.79 (the basic private and co-operative education legislation), the Ministry of Education was obliged to support private and co-operative schools through three types of contract: annual or multi-annual contracts of association, simple contracts, and contracts of patronage. Priority had of course been given to schools that provided the possibility of education in areas where state secondary education was not available.

The aim was to provide equal opportunities of access to education, whether state or private, in a spirit of pluralism and in the overall interests of the education system. To this end, in accordance with the principles set out in the Statute, the Government had recently opened a line of special low-interest credit with a view to extending the network of private and co-operative schools as part of the policy to standardize conditions in the state and the private and co-operative systems. This had been accompanied by in-service training for the teachers in these schools based on the same criteria as for state education. The intention was to promote the general alignment of teaching, although the experiment with the first autonomous schools would continue in order to permit innovations in organisation and curricula.

No appreciable change was planned in government policy on private and co-operative education, especially since its guiding principles were enacted in legislation that Parliament had adopted by a large majority.

Question 24

In view of the far-reaching effects of the recent and proposed reforms, what are the main concerns of teacher training policy? In particular, how will the quality of teaching be assured during a long period of expansion and curricular reform and adaptation?

Mr. Emidio stated that teacher training underlay all the qualitative changes it was hoped to make to the educational system. To sum up the guidelines set out in the Background Report, the priorities in this area would be:

- a review of the policy on in-service teacher training, regarded as the teachers' duty and right, which would be based on the regionalisation of support structures, the use of new educational technologies and the idea that schools were the logical place for such training;
- diversification of the means whereby non-established teachers could obtain a full professional qualification so as to raise general professional standards;
- greater attention to the needs of less privileged sectors, particularly vocational, special and pre-school education;
- more extensive use of higher educational institutions for initial teacher training.

These priorities would be taken up in a "national training project" which, besides ensuring efficient distribution of resources, would define the structural and functional development strategy of the teacher training system.

Question 25

There are continuing problems over the establishment, promotion and posting of teachers. Are there any plans to revise the career structure for teachers?

Mr. Emidio explained that the fact that teaching staff had no statute, which only existed for higher education, was still one of the most serious obstacles to a coherent and systematic educational policy for more stable teaching staffs, regional provision and teacher training in the various educational or supervisory aspects of their duties. As the Background Report unequivocally stated, drafting this statute was a priority for the reform of educational management; preliminary studies had in any case already been carried out in consultation with the teachers' unions.

In answer to the examiners' question about teacher absenteeism, the *Minister* said that this was no higher than in other sectors of employment and was mainly confined to young unmotivated teachers who did not have full professional training. What was needed first of all was therefore teachers who did have such training. However, he admitted that working conditions, and especially housing, were very difficult for certain teachers. A system of career bonuses or benefits would certainly be useful.

Question 26

The Ministry of Education has adopted a plan for the development of adult education within the context of a recurrent or continuing education philosophy. Given the lack of resources, what are its priorities in adult education?

Mr. Pinheiro stated that the National Plan for Adult Literacy and Basic Education (PNAEBA) was endeavouring to respond to the constitutional imperative that it was the State's responsibility "to provide universal basic education and do away with illiteracy". This Plan had been devised to implement Act N° 3.79, whose aim was "the systematic and progressive eradication of illiteracy and gradual admission of all adults who so desire to the different levels of compulsory education".

In this context, literacy training was the first priority of adult education policy. The resources to be earmarked either for literacy training or preparatory education had been set for the first five years of this Plan: Esc. 15 million for literacy and basic education and Esc. 10 million for preparatory education (at 1979 prices). By the end of the Plan – ten years – the rate of illiteracy should have been reduced to less than 10 per cent; during the first five years, according to schedule, the rate of adult participation in preparatory education should, for its part, double.

The literacy programme was launched in 1980 and the targets for its initial stages had been achieved. There had, however, been some delay in introducing the preparatory education programme; indeed, it was now realised that pilot experiments should have been carried out first.

When drafting the National Plan for Adult Literacy and Basic Education, it had been necessary to allow for the country's small available resources and for the need to fit literacy action into the context of cultural development in order to prevent the emergence of regressive or functional illiteracy. The initial participation targets were therefore not very ambitious.

The success of adult education had been quite small in general. This could be explained, in particular, by the persistent use of unsuitable teaching methods, especially for preparatory education. It would be possible to improve the profitability of existing resources and reduce the cost per student by putting less emphasis on direct teaching and more on private study, adapting curricula and teaching methods to suit the individual student, organising courses at the place of work and developing modular teaching – all in the context of continuing education.

Another priority was correspondence courses at first-cycle general secondary level. In this area of distance education, mention must also be made of the new possibilities open to adults when the school television channel came on the air. The National Plan for Adult Literacy and Basic Education, the reform of secondary education, secondary school correspondence courses and the general education provided by school television would form the main features of a modern adult education system.

V

POST-SECONDARY EDUCATION

Question 27

There appears to be some confusion about the overall policy for post-secondary education. How do the authorities view the present and future roles of the various institutions? Are they in favour of a binary system? If so, how do they propose to build up the non-university sector to a size and diversity that will enable it to meet the demand for high-level professional and technical skills in the labour force?

Question 28

How much importance is attached to offering short-cycle courses at the post-secondary level? What priority is given to the development of the network of polytechnic institutes? How can the former middle-level technical schools be helped out of their present identity crisis? Has any thought been given to introducing the Community College model?

At the present stage in the development of higher education and owing to the prestige of the universities in Portugal, the *Minister* stated that it was proposed to set up an essentially binary system comprising:

- a university subsystem: an essentially academic four- or five-year course leading to a degree; the universities and university institutes would also be responsible for masters and doctorate courses;
- a polytechnic subsystem: a heavily occupation-oriented two- or three-year course leading to the bachelor's degree; the polytechnic institutes would also provide two-year advanced courses in occupational specialities immediately after the degree has been obtained or after a few years' occupational experience.

As mentioned above, recent studies had shown that, except in certain special areas (engineering, management, architecture, teaching), the Portuguese universities' graduate output was quite sufficient. A new sector of higher education with very different objectives therefore needed to be introduced: this was the idea behind the creation of the polytechnic institutes with their more practical career orientation. Clearly, one of the major difficulties of this programme was finding teachers who were practitioners in industry and not just university trained.

The former commercial and industrial institutes would have to be integrated into the polytechnic subsystem. In spite of resistance to this integration, mainly owing to the prestige and social status conferred by university degrees, some progress had been made and at least a few of these institutes were shortly to be integrated.

The Community College model had been considered, but it was not thought possible to adopt it in full before the polytechnic subsystem had been consolidated, both for reasons of human and material resources and because the actual concept of a Community College might not be very well received given the importance attached to diplomas and degrees.

Steps would be taken to promote agreements between the two subsystems concerning specific activities and even to set up mixed structures in regions where the shortage of human and material resources would justify doing so: this was the case for the autonomous regions of Madeira and the Azores and the integrated Teacher Training Centre at Aveiro.

It was planned to create 18 polytechnic institutes throughout the country and these were now at various stages of development. By 1985/86, they would probably take 15 to 20 per cent of all higher education students and a third of all secondary school-leavers (see the reply to Question 18).

Question 29

It is alleged that present university admission procedures are cumbersome and do not prevent a very high dropout rate at the end of the first year. What is the authorities' response to these criticisms? In particular, do they intend to improve the transition from upper secondary to university-level studies? What will be the respective procedures for access to the universities and the non-university institutions, and how will they be related?

The *Minister* pointed out that one reason why the present university admission procedure was so cumbersome was that candidates were graded centrally at national level. Grading could no doubt be technically improved (for example, with a better data-processing system), but it would have to be retained because of the numerus clausus and the fact that each candidate must be allowed to apply for several courses in several institutions.

It was also felt that under the present procedure the choice of candidates was determined too heavily by their results in secondary school. It must be added that while it might be envisaged to assign some importance to the marks obtained in secondary school to make up for the random character of the national university entrance test, this might also be rather unfair given the disparity of marking criteria across schools. Lastly, there was no correspondence between the level of knowledge required for university admission and what was taught in secondary school; hence the persistently high rate of repeats in higher education.

The admission procedure to be introduced in 1984 should solve some of these problems. It comprised:

1. a better match between 12th grade-teaching and what was required by the universities;
2. greater freedom of choice for candidates;
3. a simpler data-processing programme for placing students;
4. greater equity since grading would be based on national tests.

One reason why this new procedure had been worked out was to retain the numerus clausus since university output was ample. Furthermore, since some people completed their education in secondary school, there was no real reason to base university admission on the marks obtained there. Besides, this last method led to overmarking. These two levels must therefore be made independent of each other.

The new procedure only concerned university entrance. Given the regional character of the polytechnic institutes, special entrance examinations were planned in their case. There was no denying, however, that this new procedure might also be criticised, especially since it made the candidate's chances of being admitted to university or excluded from it for a whole year dependent on a single examination. The actual form of the tests was perhaps debatable: in order to obtain rapid and objective grading, the tests would be of the multiple-choice type, which was particularly suitable for data processing.

Attempts might be made to reduce these disadvantages, but it must be agreed that in the current unstable political situation with its resulting measure of social opportunism, it was becoming extremely difficult to introduce a procedure that was at once appropriate, fair, objective and rapid and that satisfactorily assessed students' ability to go on to higher studies. But this problem was not peculiar to Portugal, as a great many delegates pointed out.

Part Three

THE EDUCATION SYSTEM IN PORTUGAL
THE MAIN OPTIONS AND THE FIRST REFORMS

Summary of the Background Report
prepared by the Ministry of Education, Lisbon

I

THE ROAD TO EDUCATIONAL REFORM (1974-1982)

Changing the school system

The establishment of democracy which followed the April 1974 revolution brought far-reaching changes in Portuguese society, and especially in education. Since that time the education system has been evolving continuously, adjusting to the new socio-political context which is structured in accordance with the principles laid down in the Constitution of the Portuguese Republic.

Far-reaching as they were, the changes in school life following events in 1974 were not accomplished without serious problems, all the more so because the "revolution" of 25th April exploded all the tensions that had been building up for so many years, bringing in its wake a climate of liberation hardly propitious to logical thinking. At central government level, the Ministry of Education was faced with a general crisis situation in almost all secondary schools, higher education and even in preparatory schools, and inundated with demands for the reorganisation of the school system or the teaching profession, not to mention proposals for institutional reform.

This wave which swept through Portuguese society and broke over the school system did have some very positive effects. In particular, it released the renovating energy that had been repressed until then. Here, there and everywhere the desire for a pedagogical renewal and new educational attitudes suddenly appeared. In fact, the protagonists of this movement – both pupils and teachers – were seeking new ways to change the relationships between the various participants in school life and, especially, to improve collective decision-making mechanisms with regard to educational or vocational questions. This debate was obviously set in a wider political context, since ultimately the question at issue was how to participate in the thinking and action for building the new Portuguese society.

From intentions to realities

But the biggest challenge to the education system presented through the body immediately responsible for it, the Ministry of Education, was the problem of the real "democratisation" of education in a broader sense than mere "equality of opportunity in access to education". In spite of the climate of continuing tension prevailing in the country at that time, various concrete proposals were put forward in an attempt to meet this challenge, on three planes: proposals for structural changes in the organisation of the education system, particularly as regards administration and management; suggested changes in the definition of educational objectives at the various levels (in particular, through curriculum reform and a different pedagogical attitude); and proposals to improve the economic status of teaching and non-teaching staff.

The process of educational reform was thus set in motion along these lines, based on new principles; but good intentions soon came up against realities. The limitations of the pragmatism behind this approach rapidly became apparent, as did the need to go beyond the first tentative experiments and place the new action and thinking in the context of an overall plan that could give internal coherence to the various aims pursued and define the means of achieving them more clearly. And although the will to change expressed by the majority was as determined and as strong as ever, it was continually hampered by the ingrained inertia of centuries of conformism. Reality was proving to be intractable, particularly since educational practices continued to be based on old-fashioned laws, in particular the well known Decree No. 45587 of 10 March 1967, generally referred to as "the pedagogical experiments decree".

Lasting achievements

These practical difficulties were, in fact, only the reflection in the education system "of the more far-reaching and general social and political conflicts with which the revolutionary process had to contend at the time". As regards education, such conflicts resulted in a gap between the provisions of official decrees, all too often prompted by political considerations, and the practical possibilities of their application. Moreover, the inability of the administration to adapt to institutional change as and when necessary made the situation worse by creating real breaks of continuity in school routine, already disturbed by frequent conflict. Lastly, the absence of any machinery for the evaluation of the projects implemented precluded any critical monitoring and thus made it impossible to adopt a systematic approach based on "scientific" criteria.

Nevertheless, even though they may sometimes have been misconstrued, the most interesting and most generous of the ideas which emerged during the period of upheaval immediately following 25 April 1974 are now considered as lasting achievements. As regards educational structures, for instance, the introduction of a "phase" system in primary education has helped to combat social handicaps at the first level of schooling. Another idea dating from the same period is the unification of secondary education so as to do away with the previous two-stream dichotomy which traditionally marked a difference in school status and thus in social status. Similarly, the concept of opening schools to the community – particularly the preparatory schools – is a continuing guideline in educational policy. As regards management and teaching staff, the main achievements include the institutionalisation of a participatory system in which teachers, pupils and non-teaching staff are represented, as well as the rehabilitation of teachers' status, in particular through an improvement in their material conditions and the recognition of their trade union rights. Finally, from the pedagogical standpoint, new disciplines and fields of study were introduced into the curriculum and innovative pedagogical methods, guidance and evaluation practices were developed in primary, preparatory and secondary education during the two years following the events in 1974.

The main thrust of the new educational policy

The main thrust of the new educational policy was defined in 1976, after the adoption of the Constitution of the Portuguese Republic. Emphasis was placed on the three following priorities:

1. The need to rethink the entire education system in the light of the new Constitutional legality.

2. The need to ensure some measure of stability in the most representative educational sectors.
3. The need to regard certain pedagogical innovations, hitherto conducted on an experimental basis, as being irreversible.

The aim was, in fact, to define and implement an education system which could represent an alternative to the model established in Act No. 5/73, an Act which had not come into force in view of the new situation created by the "Movement of 25 April". This was all the more difficult to achieve since enrolments had progressively increased heavily in both secondary and higher education and the search for a consensus on the appropriate solutions to the many problems came up against the conflicting options of the various socio-political groups, which tabled in the Assembly no less than four different plans for the reorganisation of the education system.

Consensus was finally arrived at because the Constitution adopted in 1976 laid down the following main principles upon which educational reform was to be based:

1. Elementary education shall be universal, compulsory and free.
2. Freedom to learn and to teach shall be recognised.
3. The State shall not have the right to intervene in the content of education and culture on behalf on any doctrine, whether philosophical, aesthetic, ethical, political or religious.
4. Schools shall be open to all.
5. Every citizen shall have the right to education and culture, instruction and equal opportunity in education.
6. Education shall aim to develop pupils' personality and fit them for productive and social activities.

Consensus on an action platform

On the basis of these very general principles, several series of measures were considered, defined and then proposed at the various levels mentioned above. In fact, the consensus reached on overall aims made it possible to construct a solid action platform, the main points of which are given below.

As regards measures to put into practice, the principle that "education shall be universal, compulsory and free", several legal texts set out a number of precise provisions. Similarly, recognition of freedom to learn and to teach is the subject of two Acts, one on "the bases of private and co-operative education" (Act No. 9/79 of 19 March), the other on "freedom of education" (No. 65/79 of 4 October) and also of the Decree establishing the "status of private and co-operative education" (No. 553/80 of 21 November). Guarantees against possible intervention in educational content on philosophical, ethical, aesthetic, political, ideological and religious grounds are included in specific provisions of the Constitution.

The determination to ensure real democratisation of education was reflected in a series of specific decisions. First, Act No. 5/77 defining the status of schools set up a state pre-school education system and the "phase" system introduced in primary education was also improved. Education was unified and educational structures designed to back up secondary education were set up with a dual function: to permit further studies and to facilitate integration into working life. In addition, a series of measures was taken with the following aims:

a) to enlarge higher education in the framework of a diversified regional structure;
b) to develop special education in accordance with the guidelines laid down;

c) to develop literacy programmes in accordance with the Anti-illiteracy Act, which provides for the implementation of a National Plan for adult literacy and basic education;
d) to develop and diversify school social services;
e) to strengthen mechanisms for the democratic management of preparatory, secondary and higher education institutions;
f) to diversify initial training programmes for teachers, in particular through the creation of teacher training colleges and qualifications (first degree, baccalaureat) for primary and secondary school teaching;
g) to develop continuing education activities for teachers;
h) to set up in-service vocational training schemes;
i) to carry out experiments in decentralisation of central administrative services.

To cope with problems of equal opportunities as regards access to education, various solutions were considered but not always backed up by the concrete measures which would have been desirable:

a) extension of social aid schemes;
b) enlargement of the school map at every level of education;
c) extension of adult education.

Similarly, the principle embodied in the Constitution in the clause stating that "education shall aim to develop pupils' personality and fit them for productive and social activities" gave rise to a series of decisions concerning, in particular:

a) revaluation of the aims of education in order to modernise it and adapt it to new pedagogical methods and to social change;
b) review of curricula in certain educational sectors, particularly the terminal classes of secondary studies;
c) official endorsement of the vocational character of the twelth year of education (Decree No. 240/80 of 19 July);
d) organisation of new courses in university higher education and development of post-graduate studies;
e) institutionalisation of short-cycle ("polytechnic") higher education (Act No. 61/78 of 28 July).

A new stage

Despite some haphazard trial and error and a number of vicissitudes, the revolution of 25 April 1974, set in motion (in education as in every other sector of Portuguese society) an irreversible movement which has already resulted in some decisive steps towards reform. Eight years on, however, those who started or guided this unprecedented movement feel it necessary to make a provisional assessment of all the positive achievements deriving from their past efforts so as better to plan for the future. Today, the various political parties all share the same ambition: to set up a sufficiently broad, precise and flexible framework to ensure optimal development of the educational sector. The Government Bill on educational reform presented to the Assembly and the three proposals from the opposition parties are clear evidence that the government, like the policy-makers, believes the time has come to move on to a new stage. While no one disputes the need for educational reform, it even seems that today there is a broad consensus on its content, since all four Bills contain a series of roughly similar proposals which seem to reflect general agreement. Furthermore, the new provisions under the amended Constitution of 1982 help to strengthen this consensus, since they constitute a kind of common ground where policy-makers with different ideals and convictions may find the necessary material for their thinking. Moreover, the various studies already carried out or currently in progress should provide some valuable clarifications for the public debate which, as everyone hopes, will soon start up.

II

THE MAIN OPTIONS AND THE FIRST REFORMS

The amended Constitution Act: a new legal framework for educational action

Adopted at a plenary meeting of the Assembly of the Republic on 12 August 1982, the new Constitution Act changed none of the basic principles set out in the 1976 Constitution. On the contrary, it broadened them by adding a series of clarifications which should give added impetus to educational policy.

In particular, the amended Constitution Act continues to uphold the right to individual freedom and the personal guarantees with regard to education through an added paragraph which expressly recognises "the right to set up private schools and co-operatives" (Article 43). Though it remains subject to current tax legislation, private and co-operative education is no longer regarded as a "substitute" for state education (Article 75, para. 22). The same Article, moreover, stresses the non-denominational nature of state education, while Chapter 4 recalls that it is for the State to promote the democratisation of education and ensure that the education available in schools and other training institutions contributes to the development of the personality, social progress and democratic participation in community life (Article 73, para. 2). In the same perspective, the new Constitution also stipulates that education must be changed in such a way as to prevent its contributing to political, social and economic inequalities (Article 74, para. 21).

As regards the broad lines of educational policy, Article 74, paragraph 3 of the amended Constitution Act contains two new provisions not in the 1976 Constitution – special education for the handicapped and instruction in the Portuguese language and culture for immigrant workers' children. Policy regarding access to university education must take into account not only national requirements of qualified manpower (a point already emphasised in 1976) but also the need to raise the educational, cultural and scientific level of the population as a whole, while continuing to promote and encourage the access of workers and their children to university education (Article 76, para. 11). The new Act also includes a clause recognising the scientific, pedagogical, administrative and financial independence of the universities, on terms which remain to be legally defined.

As well as confirming the provisions of the 1976 Constitution as regards the participation of teachers and pupils in the democratic management of schools (Article 77) and associations (Article 73), the amended Constitution stresses that the State must give parents the support they need (Article 53) and promote and contribute to scientific creation and research (Article 73, para. 4). The new text also emphasises the right of young people – especially those at work – to education, vocational training, physical education, sporting activities and creative leisure pursuits (Article 70, para. 1). Here the State has a vital role to play in aiding and encouraging the work of the various organisations concerned and in fostering all possible kinds of international exchanges among young people, in co-operation with families, schools, firms, workers' associations and those involved in cultural and leisure activities (Article 79, para. 3). The new text provides some clarification on the subject of sport, stipulating that the State must help to promote, encourage and guide the practice and generalisation of sporting activities in co-operation with schools, associations and clubs (Article 79, para. 2).

Finally, the amended Constitution stipulates that the Plan will provide for the co-ordination of educational and economic policies and that, as all legislation concerning the education system is the prerogative of the Assembly of the Republic, it cannot be the subject of any government initiative, as was the case under the terms of the Constitution approved in 1976.

The proposals for educational reform put forward by the political parties

Now that the legal framework has been clearly defined and those concerned have learned to understand the disadvantages – not to say the dangers – involved in undertaking educational action piecemeal, it seems that the time is ripe for thorough and all-embracing educational reform.

As mentioned earlier, the main political parties, aware of the worsening crisis in the education system, put forward four projects which provided an excellent working basis, since they enabled a consensus on fundamental questions to be reached. These projects emphasise the need for gradual overall reform through the establishment of an institutional model sufficiently flexible to be adapted to the various social, economic and political realities. They also stress the urgency of modernising the administrative apparatus to take into account the need for decentralisation so as to ensure participation of local and regional authorities, which are in touch with the legitimate aspirations of the population. All the political parties which took part in the debate advocated a substantial increase in subsidies to the education sector, together with strict planning and management. Plans extending over several years should be drawn up so as to respect the priorities identified. Other recommendations included harmonizing the main education sectors, developing pre-school education, generalising compulsory education, paying special attention to the questions raised by vocational training for young people and stepping up school social aid services. Certain priority sectors will have to be identified and a development strategy concerning them decided upon. Finally, stress was laid on the need to draw up inventories of requirements and launch prospective studies to be continually up-dated and amended as necessary.

While there is consensus as to the general direction the reforms should take, divergences persist as regards the various sub-sectors of the education system. Opinions differ, in particular, on the way in which the different educational cycles are to interrelate; on aims and content; and on priorities and development strategies. There are also various conceptions regarding the respective roles to be played by the various ministries; school facilities; special education; teaching of the arts; teacher training; and scientific research.

However this may be, it is clear that all future action must proceed from a complete overhaul of the education system and its administrative structures. These questions are bound to give rise to debate at every level of society, and if this debate is to bear fruit it should be as well-informed as possible, particularly with regard to the consequences for human, material and financial resources which the various projects would entail. Obviously it is important that the agreement reached should be as broadly based as possible so as to arrive at an acceptable joint project corresponding to the wishes of the majority.

A European perspective

Important as it is, reference to European integration is still largely theoretical for Portugal – at least so far as education policy is concerned – and it is hard to see how it could be achieved in practice by applying any one particular method.

From 1976 on, however, plans were made to step up co-operation with European countries in the education sector. It became clear that educational reform must be based on the following broad principles: strengthening of measures aiming at the democratisation of education; modernisation of educational structures (not only curricula, content, teacher training, methods, etc., but also the complex administrative structure); development of efforts to set up lifelong education, i.e. a continuous and flexible education process; promotion of "the European idea" so as to strengthen international solidarity.

But while everyone is agreed on broad principles, it is hard to reach a consensus when it comes to applying them to education in Portugal. However, the main European policy trends in this area seem to be compatible with current reforms in Portugal: progressively generalised application of the principles of compulsory basic education and training for all; better spread of school services and facilities; gradual expansion of vocational training in schools; increased co-ordination of preparation for working life and vocational training with labour market requirements; development of scientific research, particularly in higher education, to encourage free movement of workers and recognition of the right of establishment; flexibility and diversity of educational and training sub-systems.

Decentralisation and regionalisation

Definition of a model for the regional organisation of the Ministry of Education's services has long been a major concern. As early as 1973, two proposals for the creation of Regional Education Commissions were put forward. Unfortunately, however, economic circumstances at the time prevented their implementation.

After 25 April 1974 steps were taken to coordinate and interrelate the various services and in 1980, in spite of a number of changes in policy direction, a preliminary Draft on decentralisation was prepared as a result of a considerable amount of groundwork involving the services concerned and proposing new ways of opening out the Ministry's action.

Three measures, if it had been possible to implement them completely, might have brought decisive progress in decentralisation. These were the proposal to set up a Decentralisation Office in 1979; the Ministerial Order of 1981 on structural reorganisation of the Ministry; and the Ministerial Order of 1982 endorsing the 1980 Draft and announcing experimental decentralisation measures in four selected regions. However, the publication in 1980 of a White Paper on regionalisation by the Ministry of Internal Administration (MAI) started an irreversible movement, since it was followed in 1981 by the creation of three new bodies: the Technical Secretariat for Regionalisation, the Higher Council for Regional Affairs and the Commission on Administrative Decentralisation. The legal framework for decentralisation was set out in four Bills previously tabled in the Assembly of the Republic, and in January 1982 the Cabinet approved a comprehensive report setting out the general principles of decentralisation (guidelines, options, phases). Then, on 4 September 1982, the Cabinet adopted measures providing for the decentralisation of administrative functions.

The Ministry of Education is now waiting to be fully integrated into the new framework, which is not yet really operational. The ultimate aim is to permit decentralisation of functions so as to adapt the education system to the general principles concerning the distribution of political authority set out in the Constitution. This involves the local authorities, which are an integral part of the country's democratic structures. Central government thus has the responsibility of creating the right conditions to enable local authorities to intervene and participate in management at local and regional level, by putting the necessary instruments at their disposal. The decentralised system finds its fullest expression in regionalisation, which reflects recognition of the legal integrity of the region, whose interests are expressed through representative bodies.

For the municipalities, these new duties, added to those they originally had in administrative regions, will have various implications as regards educational policy. In view of their new responsibilities with regard to unified secondary education, they will have an increasingly important role to play as compulsory education gradually becomes generalised. The regions will have special responsibilities as regards complementary preparatory education, special education and vocational training.

When the regionalisation process is completed, central government will still be responsible for defining the main thrust of policy. However, the central bodies will delegate powers to regional or local authorities to enable them to implement that policy through specially created peripheral administrative services, adapting it to particular circumstances.

From central administration to decentralised structures

Thus, the main features of the educational reform – based on the principle of lifelong education – are modernisation, democratisation and decentralisation. These three principles, which imply a series of consequences, may be applied by taking immediate steps at both central and peripheral administrative levels.

As regards structures, the aim is in particular to:

a) give some autonomy to financial and budgetary management structures;
b) set up services capable of making innovations in pedagogical methods and teacher training;
c) co-ordinate and concentrate administrative structures in non-higher education;
d) restructure and activate the sectoral planning body;
e) review the institutional status of the distance education services, placing maximum resources at their disposal;
f) redefine the objectives, structure, composition and operation of the consultative and co-ordinating bodies, so as to improve participation in the Ministry's activities;
g) set up an Institution of Special Education;
h) reorganise structures and management methods as regards school buildings and facilities;
i) establish clear areas of responsibility for activities that overlap with those of other ministries;
j) transfer to other ministries services which are more appropriately located there.

Operationally speaking, it would be desirable to:

a) establish a better functional link between the planning bodies and the decision-making process;
b) rationalise resource management methods in the light of the objectives to be achieved;
c) reorganise statistical services and introduce standard methods for the collection, processing and analysis of data;
d) introduce computerised management techniques, which could then be gradually and systematically brought into general use.

To derive the greatest possible benefit from decentralisation, the aim is to introduce into educational administration the concept of "educational centre", which should lead to better operation and management of educational institutions by granting them some degree of autonomy. The principle of financial and budgetary autonomy, i.e. the ability to dispose of their own diversified resources, is already accepted, as is the principle of autonomy in teacher recruitment and curriculum development.

III

THE PRINCIPAL OBJECTIVES OF THE NEW EDUCATIONAL REFORM

Restructuring the education system

Efforts should focus mainly on the reorganisation of secondary education (especially the complementary cycle), the development and rehabilitation of polytechnic higher education and the gradual extension of the period of compulsory schooling to nine years.

Thus, complementary secondary education courses will concentrate on technical and vocational training. According to requirements, specific curricula will be drawn up by schools in co-operation with local authorities, firms and any other relevant services or institutions. Polytechnic higher education will be rehabilitated and will be quite distinct from university education. Just as the reform of secondary education aims at training middle-level technicians, so polytechnic education will be concerned with training technicians at various levels, depending on labour market requirements.

Policy as regards access to education and achievement at school

Projects at present under consideration take the view that access to higher education should not automatically depend on the results obtained at school. For this reason, the scheme under consideration provides for the organisation of a competitive examination open to all pupils having completed the secondary education cycle; it will consist essentially of a battery of multiple-choice tests in the subjects considered to be determinant.

Since achieving at school depends very much on the conditions prevailing there, special attention will be paid to the factors which determine the quality of education: better-qualified teachers, improved buildings and amenities, the development of social aid schemes (school transport, facilities for board and lodging). The enrolment capacity of the education system (from both the social and geographic standpoints) will be stepped up, through a review of the school map with new criteria, taking better account of school distribution in relation to regional development.

In addition, the continuous assessment of performance will be strengthened in primary and secondary schools, putting the emphasis on the teaching-learning process rather than on evaluation based on results; ultimately, examinations will be phased out altogether.

Reviewing the physical dimensions of the school network

Because of the sheer "weight" of the existing structures, opportunities for change in this respect are few. And yet the new educational philosophy, which sees education as a never-ending process, entails rethinking the school network, since educational institutions must now become multipurpose centres – an integral part of the surrounding community, with many different in- and out-of-school functions and open to widely differing sectors of the public, young people and adults. So, here, preference will be given to the "regional" approach, not only in the management of resources and the planning and carrying out of activities but also in the policy decisions which the creation of these educational centres will call for and which will need to take the requirements of integration and regionalisation into account. However, while the community-oriented, multipurpose aspects of the school must not be forgotten, it will nevertheless be necessary, in the short term, to have recourse to various flexible solutions making it possible to reconcile the use of existing facilities with pedagogic demands, especially in primary education, where situations differ widely.

So far as secondary education is concerned, it is not possible, given the present lack of facilities, for any one institution to satisfy all the different demands for training. For that reason, and so that schools can specialise, as they must, without detriment to equality of opportunity, it is strongly recommended that the pedagogic specialisation of the various schools in a particular area should be organised in such a way as to be complementary, i.e. so far as possible each area should be able to provide all the different paths and options.

School building and facilities

This is a three-tier problem involving building design and policy, building management, and facilities management. As regards the first point, the priority needs are for intensified planning and detailed inventories of the facilities required, defining the typologies of the various needs in accordance with the new concept of schooling to be introduced. Reorganising structures, school building and related activities might be entrusted to an institute or public enterprise, thus reducing building costs by rationalising administrative structures. In any case, it must be realised that changing and extending the school stock calls for resources so considerable that they can only be made available in the medium term. The fact that there is no single interdepartmental authority – either within the Ministry of Education or outside it – responsible for policy in this area also slows down work on facilities to meet the needs of enrolment and future development. A policy decision here is urgent.

Education innovation and teacher training

Various experiments in educational innovation and teacher training have been tried out in Portugal, but so far not even the outlines of a co-ordinated national scheme for teacher training linked to an innovative policy have yet evolved.

Notwithstanding this, the experience gained and the studies carried out point to three main lines of future action:

1. formulation of a flexible training model which can accommodate the desired changes in the education system in terms of the demands of participation, promotion and innovation;
2. definition of the different categories of teaching staff so as to upgrade the educative function;
3. systematic planning of initial training requirements for teachers and the corresponding priorities.

In the short and medium term, the present form of initial training for pre-school, primary and preparatory levels will gradually be replaced by the new, integrated scheme developed in the framework of the higher colleges of education. It will, however, be necessary to take certain steps at secondary school level:

a) provisionally, at least, to introduce into higher courses not specifically oriented towards teaching, education branches like those existing in the Science Faculty;

b) to review the present procedures for the integration and training of trainee or non-established teachers so that practice is supplemented by theoretical training;

c) increase the number of teachers and raise professional standards (to do this it will be necessary to extend in-service training and refresher courses, beginning with the disciplines where this is most urgent).

Refresher courses for teachers might well be improved by calling on specialists from industry, the civil and government departments or services. For in-service training it is planned to follow two directions: recourse to mass media and functional and executive decentralisation of the system.

School management

The idea of the school as an "educational centre" implies the creation of managerial posts – school manager or educational centre administrator. Educational centres will also require some degree of autonomy in organising and developing their activities – either from pedagogical necessity or for reasons of administrative efficiency.

Thus, in defining the status of teaching staff a clear distinction should be drawn between teaching and supervision, i.e. between pedagogical activities and those related to administration. Both functions, however, will be carried out in the context of the educational centres' operational autonomy, and effective solutions will be sought with a minimum of red tape in both teaching and administration.

Adult education

As we have seen, lifelong education is the underlying principle and driving force of the education system – a principle recognised by the Constitution, which stresses the value of forms of education adapted to needs arising throughout one's life, the importance of self-improvement and equality of opportunity. At the same time, this approach implies the decentralisation of educational authority, greater structural flexibility and the pursuit of an integrative and all-embracing concept of education.

Adult education falls squarely within this framework and is a promising field for innovation in that it is less hidebound than the school system, as evidenced by experiments at present under way in preparatory and secondary education. Here again autonomy is essential to development, since it would seem that in the medium and longer term, only structures which are autonomous and yet integrated into the overall school and out-of-school system can lead to a successful system of continuing adult education while ensuring concomitant changes within the school system.

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